



**Project  
Management  
Methodology**

## Study Case



Methodologies  
Office

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## About this Publication

This publication presents a curated collection of PM<sup>2</sup> project plans developed over several years by practitioners within the European Institutions. It offers readers a practical entry point into the application of the PM<sup>2</sup> Methodology, as each artefact included here stems from a real project that has been tested, refined, and aligned with the latest version of the PM<sup>2</sup> Project Management Guide.

The focus of this study case is to support learning and adoption of PM<sup>2</sup> by illustrating how core templates, such as the Project Charter, Business Case, Project Handbook, and Risk Log, can be adapted and applied in real organisational contexts. Rather than remaining theoretical, the plans highlight real project scenarios, decision points, and governance considerations encountered by teams during implementation.

This publication serves both as a study aid for those seeking to understand PM<sup>2</sup> artefacts in practice and as a reference for project teams looking for an example when developing documentation for their own initiatives. Readers are encouraged to explore these artefact examples to deepen their understanding and strengthen their project management practice. The materials have been progressively edited and enhanced by the Methodologies Office to ensure alignment with evolving organisational standards and lessons learned from successive projects.

It should be noted that this study case does not attempt to provide an exhaustive or prescriptive set of plans. As a collection built from real project experiences by multiple contributors over several years, it inevitably carries imperfections, occasional omissions, inconsistencies, or areas where additional detail could be added. Both the content and the publication itself may reflect such limitations. Nevertheless, the set of artefacts presented here has repeatedly been characterised by practitioners and reviewers as highly useful and worth sharing with the extended PM<sup>2</sup> community, precisely because it captures authentic examples that can be expanded, adapted, and improved by others to fit their specific needs.

The theme chosen for this study case is the rollout of the PM<sup>2</sup> Project Management Methodology within a real organisational context. This theme offers particular value because it provides a complete, practical blueprint that practitioners can relate to and replicate. Such a project combines technical dimensions, such as the setup of collaboration spaces, project management tools, and central repositories, with the organisational transition aspects needed to embed new ways of working. Methodology rollouts include change management activities, training programmes, governance alignment, and stakeholder engagement. By integrating both the technical enablers and the business implementation challenges, the case provides readers with a richer learning experience than a purely technical or purely organisational example would allow.

We would like to extend our sincere thanks to all project practitioners and PM<sup>2</sup> experts across the EU institutions whose work, insights, and dedication over the years made this publication possible. Their real-world experience shaped the project plans presented here, ensuring that they reflect both the methodology and the practical realities of its implementation. It is our hope that this study case will serve as a valuable resource for practitioners and organisations everywhere, supporting their journey towards more effective and structured project management practices.

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## Table of Contents

<b>TABLE OF CONTENTS OF PM<sup>2</sup> ARTEFACTS .....</b>	<b>3</b>
<b>STUDY CASE ARTEFACTS .....</b>	<b>5</b>
<b>INITIATING PHASE</b>	
1. Project Initiation Request .....	5
2. Business Case.....	9
3. Project Charter.....	27
<b><u>PLANNING PHASE</u></b>	
4. Project Handbook .....	45
5. Project Workplan .....	69
6. Resource Plan .....	87
7. Business Implementation Plan.....	95
8. Transition Plan .....	103
<b><u>MONITOR AND CONTROL</u></b>	
9. Risk Log .....	111
10. Issue Log.....	118
11. Change Log.....	119
12. Decision Log .....	120

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Organisation [Name]  
Department [Name]

# Project Initiation Request

## Improvement of PM Practice

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<b>Project Title:</b>	<b>Improvement of PM Practice</b>		
<b>Initiator:</b>	<Insert First Name Last Name>	<b>Department:</b>	<Insert Name>
<b>Project Owner (PO):</b>	Head of Department	<b>Date of Request:</b>	11 January 2025
<b>Solution Provider (SP):</b>	Head of Sector	<b>Approving Authority:</b>	Project Owner
<b>Estimated Effort (WDs):</b>	130 WDs	<b>Target Delivery Date:</b>	11 July 2025
<b>Type of Delivery:</b>	<input checked="" type="checkbox"/> In-house <input type="checkbox"/> Outsourced <input type="checkbox"/> Mix <input type="checkbox"/> Not-known		
<b>Context/ Situation (Business Need/ Problem / Opportunity)</b>			
<p><b>Business need:</b> There is a need to improve the quality of project outputs, the effectiveness and efficiency of project work and project management processes within Department, as well as between the Department and Contractors. Additionally, Senior Management demands improved projects monitoring and reporting to make more informed and rational decisions on investments.</p> <p><b>Problem:</b> Ad-hoc approaches for managing several projects within the Department cause miscommunication, lack of stakeholder engagement, inefficiencies, duplication of work, and poor planning and control of project work within the Department, as well as with contracted companies. This (often) leads to frustration, cost and schedule overruns, low quality of deliverables, increased risk of project failure, unsatisfied stakeholders/users and disputes with Contractors.</p> <p><b>Opportunity:</b> There are several Project Management Methodologies available on the market.</p>			
<b>Legal Basis</b>			
This project is in-line with the organisational policy that encourages project improvement in all Departments.			
<b>Outcomes (high level)</b>			
<p>The outcomes that can be expected from this project are:</p> <ul style="list-style-type: none"> <li>Increased project productivity (do more with same amount of resources);</li> <li>Improved quality of project outputs (less non-conformities resulting from quality assurance);</li> <li>Increased successful projects within the department, by improved monitoring, control and reporting on projects;</li> <li>Improved control of outsourcing activities and increased quality of contractors' deliverables.</li> </ul>			
<b>Impact (high level)</b>			
<p>Department-wide adoption of a project management method based on best practices will significantly impact on:</p> <ul style="list-style-type: none"> <li>The departmental processes, roles and interfaces with other organisational processes.</li> <li>Organisational Quality Management System roles, processes and artefacts.</li> <li>Contractors' procedures and outputs;</li> <li>Governance processes and artefacts.</li> <li>Communication documents (posters, leaflets, etc.) related to project management.</li> <li>The location and archive of projects (central repository).</li> </ul>			
<b>Success Criteria</b>			
<ul style="list-style-type: none"> <li>Achieve 90% awareness of project management methodology within the Department (through training and awareness sessions).</li> <li>All new projects started applying the project management method and templates are tailored to the project size and type.</li> </ul>			
<b>Assumptions (high level)</b>			
<ul style="list-style-type: none"> <li>Buy-in from Department' and Organisation' Senior Management (recognition of the need for a project management methodology).</li> <li>Sufficient coaching, support and training will be available within the Department or from other Departments or can be recruited, allowing for a smooth implementation.</li> </ul>			

<ul style="list-style-type: none"> <li>• A Project Management Information System (PMIS) is currently NOT available or centrally supported.</li> <li>• The project will receive appropriate resources (financial and Human Resources).</li> </ul>
<b>Constraints (high level)</b>
<ul style="list-style-type: none"> <li>• Limited availability of the Department' staff and Senior Management.</li> <li>• The methodology must be delivered until the end of the year (31 December 2025).</li> <li>• Projects within the Department should not be substantially impacted on project schedule, in result of the new methodology.</li> <li>• Extensive tailoring of the chosen project management methodology is only foreseen for exceptional situations.</li> </ul>
<b>Risks (high level)</b>
<ul style="list-style-type: none"> <li>• Resistance to change that will result on Project Managers not following the methodology.</li> <li>• The chosen methodology does not satisfy 100% the Department' needs and, therefore, major tailoring is needed, impacting the delivery date.</li> <li>• Delay of some projects within the Department, during implementation.</li> <li>• Lack of budget available caused by delays in yearly budget approval and unavailability of resources with the necessary skills. These will limit project progress.</li> </ul>



Organisation [Name]  
Department [Name]

# Business Case

## Improvement of PM Practice

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## 1. Project Initiation Request Information

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<b>Date of Request:</b>	11 January 2025	<b>Target Delivery Date:</b>	11 July 2025
<b>Type of Delivery:</b>	<input checked="" type="checkbox"/> In-house <input type="checkbox"/> Outsourced <input type="checkbox"/> Mix <input type="checkbox"/> Not-known		

## 2. Context

### 2.1. Situation Description and Urgency

Ad-hoc approaches for managing several projects within the Department cause miscommunication, lack of stakeholder engagement, inefficiencies, duplication of work, poor planning and controlling of project work within the Department, as well as with Contractors. This (often) leads to frustration, cost and schedule overruns, low quality of deliverables, increased risk of project failure, unsatisfied stakeholders/users and disputes with Contractors.

Considering the current situation, there is a need to improve the quality of project outputs, the effectiveness and efficiency of project work and project management processes within the Department, as well as between the Department and Contractors. Additionally, Senior Management demands improved projects monitoring and reporting in order to make more informed and rational decisions on investments.

An improved maturity of project management in the Department will allow making better use of the available resources and budget and increase the quality of project outputs. As many projects have one or more outsourcing components, an improved management of Contractors will have a substantial positive effect on the project cost and on the quality of Contractors deliverables.

Improving the departmental project management practice is urgent because:

- A significant number of projects within the department failed, are substantially delayed or exceed the planned budgets.
- A new programme is starting in the beginning of 2025+ 1 year, and the budget is very tight for the expected number of projects.
- The transition of the ad-hoc approaches to a standard way of working will take several months and for the management of the new programme it is mandatory that the project management methodology is operational and well understood on the 1<sup>st</sup> of January 2025+ 1 year.
- This new programme will oblige the consolidation and reporting of information to external entities, so a unique methodology will reduce the cost to perform the reporting process.

## 2.2. Situation Impact

### 2.2.1. Impact on Processes and the Organisation

The current situation has an impact on the achievement of the Department' objectives and on its image for external entities. Additionally, there is an inefficient use of resources (budget and Human Resources), which if managed in a more efficient way, they could be used to better cover other needs.

Below tables provide information on the processes<sup>1</sup> and assessed impact.

Process Category	Yes/No	Process Category	Yes/No
Policy Lifecycle		Financial Management	
Legislation Lifecycle		Procurement	
Coordination		Document Management	
Programme Management		Asset Management	
Grant Management	X	Audit	
Communication and Dissemination (external)		Human Resources	
Communication and Dissemination (internal)		IT	
Strategic Management		Other	

<sup>1</sup> The process categorisation in both tables are based on the European Commission (EC) example. Please consider to follow your organisational categorisation as suits the needs.

Process Category <sup>2</sup>	Domain <sup>3</sup>	Sub-domain <sup>4</sup>	Macro Process <sup>5</sup>	Process <sup>6</sup>	Situation Impact Description	Impact to Process Owners and Users
Grant Management	Education and Culture	Cooperation Third Countries	Project and Financial Management	Project Management	There wasn't any documented process before. New process.	Significant
Grant Management	Education and Culture	Cooperation Third Countries	Project and Financial Management	Outsourcers monitoring	Addition or change of monitoring and control activities. New artefacts or change the existent ones.	Moderate
Grant Management	Education and Culture	Cooperation Third Countries	Reporting	Progress and Financial reporting	Addition / renaming few fields on existent reports.	Minor

<sup>2</sup> **Process Category** - The EC processes are classified in 18 process categories as follows: Asset Management, Audit, Communication & Dissemination, Coordination, Document Management, Financial Management, Grant Management, Human Resources, IT, Legislation Lifecycle, Statistics Management (Analyses, Databases, Statistics), Case Management, Trans-European Services and Infrastructure Management, Structured Data Exchange Management (Star Systems), Crisis Management (Alert systems), Procurement, Program Management, Strategic Planning

<sup>3</sup> **Domain** - The domain is the cutting of the highest level of activities of the Commission. A DG has only a few areas of activities, sometimes only one. In some cases, a domain is shared by several DGs, and even by all DGs

<sup>4</sup> **Sub-Domain** - A Sub-Domain is a subset of areas of activities that meets a set of common objectives and constraints

<sup>5</sup> **Macro-process** - A macro-process is a set of processes related to a sub-domain. It corresponds to a grouping of activities according to a common business logic. Sometimes the consolidation process corresponds to the sequential execution of many processes

<sup>6</sup> **Process** - The CEAF defines a process as an organised and repetitive sequence of actions involving resources which aims at producing a result to satisfy a client's need

### 2.2.2. Impact on Stakeholders and Users

The current situation impacts Head of Sectors, Business Managers, Project Managers and Project Core Team members:

- Head of Sectors find it hard to collect information for reporting and the current Department performance is below objectives.
- Project Managers and Project Core Team members deliver too late and/or above project budget, and/or with poor quality.
- Business Managers cannot get the expected results from the outsourced projects.

### 2.3. Interrelations and Interdependencies

The current situation will negatively affect the annual budget allocation and approval, in result of the poor performance of departmental projects.

Regarding the interdependencies of this project, the most relevant ones are described below:

- Projects that are dealing with teams from different Departments need to share the same project management approach.
- For projects with one or more outsourced component, the ad-hoc project management approaches are not fully compliant with the Procurement processes and requirements.
- Projects are not following the organisational governance process.
- The Internal Audit Services identified non-conformities in the last audit, stating that the use of ad-hoc project management approaches could lead to situations of fraud in the granting process.
- The Project Management Office (PMO) of the Organisation is demanding the use of a standard methodology, in order to be able to monitor and control projects.

### 3. Expected Outcomes

The expected outcomes of this project are:

- Increased project productivity (do more with same amount of resources).
- Improved quality of projects' outputs (less non-conformities resulting from projects quality assurance).
- Improved project stakeholder engagement and satisfaction (involvement of requestor side throughout the project).
- Increased successful projects within the Department, by improved monitoring, control and reporting on projects.
- Maximisation of investments value by better visibility of project needs, benefits, impact, synergies, costs and risks by the Senior Management.
- Improved control of outsourcing activities and increased quality of Contractors deliverables.

#### 4. Possible Alternatives

##### 4.1. Alternative A: Do nothing

###### General Description

No change to the existing situation.

###### SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>Does not impact the current way of working.</li> <li>No effort and Management attention is needed for this project.</li> <li>No project costs involved.</li> </ul>	<ul style="list-style-type: none"> <li>The Department will continue with the current way of project management which is less efficient and less effective than required.</li> <li>More operations / maintenance costs.</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>None.</li> </ul>	<ul style="list-style-type: none"> <li>Continuation of the current way of working may force the Department to outsource an increasing number of projects to Contractors and incur in additional costs, without being able to monitor and control them.</li> <li>Existence of fraud situations throughout the granting process.</li> <li>Reputational impact, in result of the poor management of the new programme.</li> </ul>

###### Qualitative Assessment

Given the current poor performance of departmental projects and the objectives agreed for the programme beginning in 2025 + 1 year, this is not a viable alternative.

##### 4.2. Alternative B: Implement an international standard

###### General Description

There are other internationally established and widely used standards for professional project management, where training courses and literature are widely available on the market and certified Project Managers can be easily recruited. However, in the Organisation, the introduction of these standards requires significant investment in tailoring, with respect to the type of projects and the departmental project governance model.

###### SWOT analysis

Strengths	Weaknesses
<p>Comply with well-established and globally recognised Project Management methods and standards.</p> <p>Experienced consultancy supporting the implementation is easy to get inside and outside the Organisation.</p>	<ul style="list-style-type: none"> <li>These frameworks are not aligned with the specificities of the Organisation, so significant tailoring is needed. Considering the short deadline, this tailoring will not be possible.</li> <li>Current budget may be insufficient to cover all costs.</li> <li>Request up-front investment and lower return on long term, in result of</li> </ul>

	dependency from external entities (for new releases, etc.).
Opportunities	Threats
<p>Several available training courses and material are available on the market.</p> <p>Easy recruitment of certified staff from or outside the Organisation.</p> <p>Easier compliance of Contractors with this PM methodology</p>	<ul style="list-style-type: none"> <li>Other Departments may implement a different approach from the selected Project Management standard. In result, projects covering different Departments will have difficulty on communication / coordination. This situation will create inefficiencies.</li> </ul>

### Qualitative Assessment

This alternative is not viable given the schedule and budget constraint. Also, the alignment with other Departments would be a major (long term) problem.

### 4.3. Alternative C: Limited introduction of PM<sup>2</sup> in the Department

#### General Description

The PM<sup>2</sup> Methodology originated from the European Commission. It is open-source methodology and it provides many guidelines and templates to facilitate the management and documentation of the projects. Department-wide adoption of the PM<sup>2</sup> best practices will significantly increase the maturity of project management within the Department and address many of the problems mentioned earlier. It will also provide a clearer connection of project work performed to Department/Business Domain/Organisational strategic objectives and offer better visibility to project progress and overall strategy implementation.

A limited introduction of PM<sup>2</sup> in the Department would include these activities:

- Selected Project Managers are trained to an introductory level of PM<sup>2</sup>.
- Documentation of the new way of managing project activities within Department.
- Limited support from the organisational PMO experts.

### SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>PM<sup>2</sup> is a recommended methodology in the organisation, and it is already tailored to the organisational business environment.</li> <li>The Department will comply with the organisational specific Project Management methods and standards.</li> <li>Costs can be covered by the available budget.</li> <li>Transition will not pose a great problem.</li> </ul>	<ul style="list-style-type: none"> <li>Recruitment of certified staff outside the Organisation will be difficult.</li> <li>Limited support from the organisational PMO experts will impact the skills available on the Project Core Team and will require additional learning effort from this team.</li> </ul>

Opportunities	Threats
<ul style="list-style-type: none"> <li>• Availability of the organisational PMO courses, training material and support.</li> <li>• Alignment with other Departments that have decided to implement PM<sup>2</sup>.</li> </ul>	<ul style="list-style-type: none"> <li>• Other Departments may not select PM<sup>2</sup>. The probability of this situation is very low.</li> <li>• Due to the limited nature of this option, the introduction of PM<sup>2</sup> might slow down implementation and impact the planned deadline.</li> </ul>

### Qualitative Assessment

This alternative is viable. However there is a risk that the limited approach will impact the delivery day. Additionally, the project's outcomes may not be achieved on the long run because limited training approach can be insufficient to get a foothold that establishes the change.

#### 4.4. Alternative D: Adoption of PM<sup>2</sup> in the Department

##### General Description

Extended introduction of PM<sup>2</sup> in the Department will include these activities:

- Training:
  - All Project Managers and Project Core Team members will be trained to an introductory (1<sup>st</sup> level) of PM<sup>2</sup>.
  - Selected Project Managers will be trained to a more advanced (2<sup>nd</sup> level) of PM<sup>2</sup>.
  - Business Managers will be trained through the PM<sup>2</sup> for Business Managers path.
  - Head of Sectors will be trained through the PM<sup>2</sup> for Management path.
- Documentation of the new way of managing project activities within Department.
- Review of the roles and responsibilities within the Department.
- Definition of a change roadmap and implementation of these activities such as awareness sessions, workshops and communication leaflets and posters.
- Selection of a pilot project and follow-up of the entire lifecycle of the project.
- Creation of a temporary (or permanent) Project Support Team to offer first level support to project teams.
- Tailoring of the project management artefacts for monitoring Department contractors and reporting to external entities.
- Extensive support from the organisational PMO experts as and when requested.

##### SWOT analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>• Standard way of managing projects within the Department.</li> <li>• PM<sup>2</sup> is a recommended methodology in the organisation, and it is already tailored to the organisational business environment.</li> <li>• The Department will comply with the organisational specific Project Management methods and standards.</li> <li>• Easier consolidation of information by Management and by the PMO.</li> <li>• Compliance with Internal Audit Services recommendations.</li> </ul>	<ul style="list-style-type: none"> <li>• Will require additional effort from Department' staff at the beginning, in result of training attendances and transition to the new methodology.</li> </ul>

<ul style="list-style-type: none"> <li>• Training combined with the implementation of a change roadmap will increase the probability of an effective PM<sup>2</sup> implementation.</li> <li>• Costs can be covered by the available budget.</li> <li>• Extensive support from the organisational PMO experts will enable on-job training and decrease the learning period.</li> </ul>	
Opportunities	Threats
<ul style="list-style-type: none"> <li>• The adoption of the PM<sup>2</sup> project management methodology allows the Department to align with other Departments.</li> <li>• The adoption of PM<sup>2</sup> may inspire other Departments to use PM<sup>2</sup>.</li> </ul>	<ul style="list-style-type: none"> <li>• Resistance to change may impact the delivery of the methodology by the end of 2025 and impacting the beginning of the new programme.</li> <li>• Other Departments may not select PM<sup>2</sup>. The probability of this situation is very low.</li> </ul>

### Qualitative Assessment

This alternative is viable, within the budget and has greater outcomes. Moreover, it is very likely that other Departments will follow the same approach. This solution is the one that guarantees a well-established Organisation wide adoption.

In **conclusion**, based on the above SWOT analysis, the recommended solution is to adopt and implement PM<sup>2</sup> in the Department (Alternative D). An Organisational project management methodology is better aligned with the Department' business practice and way of working.

Alternative C, a limited introduction of the PM<sup>2</sup> methodology is not selected, because of its incomplete approach, as just training people does not result in the required organisational change and desired effectiveness gains.

## 5. Solution Description

### 5.1. Legal Basis

This project is in-line with the organisational strategic decision as PM<sup>2</sup> is the recommended project management methodology for all the projects within the Organisation, and with the organisational policy that encourages project improvement in all Departments.

The new programme that will be supported by the PM<sup>2</sup> methodology also fall under organisational strategic objectives.

### 5.2. Benefits

This project will support the achievement of the objectives of the Department, by increasing the maturity of project management within the Department. Most of the benefits are obtained on medium and long term and can be only correctly measured after project closure.

The estimation of the benefits comprises no need of further resources to manage the new programme, reduction of the costs on outsourced contracts and ability to cover more projects within the budget and to achieve more outcomes.

The main expected benefits are measured as following:

- Improved alignment of project with Department/Business Domain/Organisation' strategic objectives (maximisation of investments value):
  - 90% of the new projects within the Department are regularly monitored (a project portfolio dashboard) by Senior Management in the Management Meetings.
- More successful projects delivering on time within budget and improved quality of project deliverables and increased project productivity allowing the Department to achieve more with the same resources and budgets:
  - 20% increase in successful completion of projects (measured 1<sup>st</sup> of January 2025+ 2 years for projects completed during 2025 + 1 year).
  - All non-conformities identified by the Internal Audit Services from last audit are addressed by the new methodology.
- Projects are following organisational governance process and being monitoring and controlled by the organisational PMO:
  - All new projects within the Department (started from the 1<sup>st</sup> of January 2025 + 1 year) are evaluated by the Organisation Governance Bodies for approval.
  - Organisational PMO is monitoring and controlling all new projects within Department (started from the 1<sup>st</sup> of January 2025 + 1 year) and running projects with remaining duration >3 months.
- Improved Contractors performance:
  - 20% increase in successful completion of outsourced projects (measured 1<sup>st</sup> of January 2025+ 2 years for projects completed during 2025 + 1 year).
- Improved image of Department:
  - 50% decrease of complains from other Departments/externals entities (measured 1<sup>st</sup> of January 2025+ 2 years, counting all complains during 2025 – 1 year vs 2025 + 1 year).

**Note:** The baseline for measuring the benefits is the set of projects completed during 2025 – 1.

### 5.3. Success Criteria

- Core set of project management templates are used by 90% of the projects within the Department (measured at the end of the project).
- All projects are archived in the Project Repository.

- The Project Support Team is timely supporting all the staff requests (requests replied in 2 working days maximum).
- The Departmental Document Repository is available 90% of the time and the templates available are up to date.
- Project management templates (i.e. Business Case, Project Charter, Project Progress Report and Project-End Report) are approved by the Organisational Governance Bodies.
- All existing procedures and templates for contractors are reviewed, updated and agreed with the Organisation' Procurement Department.
- 90% of Project Managers and 50% of staff involved in projects are trained.
- 70% of the Project Managers are project management certified.

#### 5.4. Scope

Rolling-out of the Project Management Methodology (PM<sup>2</sup>) in the Department for all new and running projects, including training staff involved in projects and creation of a project management governance structure and tools (i.e. Project Support Team, project repository and departmental collaboration tool).

**OUT-of scope:** implementation of a Project Management Information System to support the PM<sup>2</sup> methodology. This can be foreseen in a next phase, but not included in the scope of this project. Also, the support to the organisational Project Management Office and to other Departments on the PM<sup>2</sup> methodology is not covered by this project.

#### 5.5. Solution Impact

The roll-out of the project management methodology (PM<sup>2</sup>) within the Department will impact:

- Business processes and artefacts:
  - The Department' processes, roles and interfaces with other Departments related processes.
  - Organisation' quality management system roles, processes and artefacts.
  - Organisation' governance processes and artefacts.
  - Communication documents (posters, leaflets, etc.) related to project management.
  - The location and archive of projects (central repository).
- Contractors procedures and outputs.
- Reporting to external entities.
- The way people are used to work, changing, adding or reducing roles and responsibilities. In fact, around 80% of the Department' resources are involved in project and programme management. These resources are including staff (30%), internal contractors (30%) and external / outsourced contractors (40%).
- The culture of Department, in result of the implementation of new procedures, which creates a more formal environment.

The solution proposed will not have any impact on the IT landscape.

The solution of a PM<sup>2</sup> project management methodology within the Department will have an impact on the following processes:

Process	Solution Impact Description
Project Management	Significant impact: There wasn't any documented process before. New process.
Outsourcers monitoring	Moderate impact: Addition or change of monitoring and control activities. New artefacts or change the existent ones.
Progress and Financial reporting	Minor impact: Addition / renaming few fields on existent reports.

## 5.6. Deliverables

- **PM<sup>2</sup> methodology:** PM<sup>2</sup> processes, guidelines, artefacts and governance model tailored to the Department needs, including artefacts for monitoring the outsourced projects and for reporting to external entities. Definition of the roadmap and procedures for all running and new projects and execution of a pilot project.
- **Departmental collaboration tool** for making available all PM<sup>2</sup> processes, guidelines, artefacts and governance model.
- **Central Project Repository** with a defined configuration management process associated to it. Alignment with the organisational document and configuration management procedures.
- **Set-up of a Project Support Team** to offer first level support to project teams.
- **Definition of a change roadmap and implementation of these activities** within the Department.
- **Training:**
  - Training of all Project Managers and Project Core Team members to be PM<sup>2</sup> certified.
  - Training of a selection of Project Managers to the level of PM<sup>2</sup> Practitioner.
  - Training of Business Managers through the PM<sup>2</sup> for Business Managers path.
  - Training of Head of Sectors through the PM<sup>2</sup> for Management path.

## 5.7. Assumptions

- PM<sup>2</sup> will not release a new version of the methodology during project duration.
- Coaching and support will be available from the organisational PMO to the Department' staff throughout the duration of this project.
- Buy-in from Department' and Organisational Senior Management (recognition of the need for a project management methodology).
- Willingness and availability of Senior Management for a high-level awareness and training session.
- The project will receive appropriate resources (financial and Human Resources). The Project Core Team will have the required skills and training.

## 5.8. Constraints

- Limited support available from PM<sup>2</sup> experienced organisational PMO.
- Limited availability of the Department' staff and Senior Management, due to a busy agenda.
- The methodology must be delivered until the end of the year (31st December 2025).
- Existing projects within Department should not be substantially impacted in result of the new methodology.
- Availability of the Management of the Organisational Procurement Department for the alignment of project controls while working with contractors.

## 5.9. Risks

- Resistance to change that will result on Project Managers not following the methodology.
- The chosen methodology is not fitting Department' needs and major tailoring is needed, impacting the delivery date.
- Delay of more than 2% on schedule for some projects within the Department, during implementation.
- Decrease in productivity due to learning curve effects that will impact projects' schedules.
- Lack of support from key-stakeholders that will result on limited adherence to the new methodology.
- Delays on Contractors projects caused by the mismatch of the methodology with the project management approach of Contractors.
- Lack of support from other Departments, such as Procurement Department.
- Lack of budget available caused by delays in yearly budget approval and unavailability of resources with the necessary skills. These will limit project progress.

## 5.10. Costs, Effort and Funding Source

This project will be mainly executed by 0.5 FTE of 2 staff and 2 internal contractors and maintained by 1 internal contractor and 0.2 FTEs of a staff, from the Department. Support/coaching will be performed by PMO during the project (0.2 FTE). The cost of the PM<sup>2</sup> courses is supported by HR, if delivered internally. So, the estimated training cost is only including the cost of the certification exams.

The budget lines that will be used for this project are XX 01 02 11 04 and XX 01 02 11 06.

<b>Solution Implementation Costs</b>	202X	202(X+1)	202(X+2)	202(X+3)	202(X+4)
Solution Development	33 K€ 0.3 FTE				
Solution Maintenance		16.5 K€ 0.2 FTE	16.5 K€ 0.2 FTE	16.5 K€ 0.2 FTE	16.5 K€ 0.2 FTE
Support	0.2 FTE				
Training	1 K€				
Infrastructure					
<b>TOTAL</b>	34 K€ 0.5 FTE	16.5 K€ 0.2 FTE	16.5 K€ 0.2 FTE	16.5 K€ 0.2 FTE	16.5 K€ 0.2 FTE

<b>Business Implementation Costs</b>	2025	2025(X+1)	2025(X+2)	2025(X+3)	2025(X+4)
Change management	0.2 FTE				
Communication					
Coordination					
Training	5 K€				
<b>TOTAL</b>	5 K€ 0.2 FTE				

The project will have an estimated total cost of 39 K€ + 0.7 FTE for 2025 and a Total Cost of Ownership (TCO) of 105 K€.

### 5.11. Roadmap

#### Initiating Phase:

- Definition of the context, impact and outcomes of the envisaged solution 18<sup>th</sup> January 2025
- Business Case approved 01<sup>st</sup> February 2025
- Project Charter approved 22<sup>nd</sup> February 2025

#### Planning Phase:

- Project planning artefacts approved 15<sup>th</sup> March 2025

#### Executing Phase:

- Tailoring of PM<sup>2</sup> processes, guidelines, artefacts and governance model to the Department' needs 12<sup>th</sup> April 2025
- Implementation roadmap and procedures approved 16<sup>th</sup> April 2025
- Creation of the PM<sup>2</sup> collaboration space and project repository 23<sup>rd</sup> April 2025
- Awareness and training completed 10<sup>th</sup> May 2025
- Project Support Team officially operational 29<sup>th</sup> April 2025
- Execution of the pilot completed 26<sup>th</sup> June 2025
- Follow-up of running projects transition completed 2<sup>nd</sup> July 2025
- Review of results and go/no-go decision 5<sup>th</sup> July 2025

#### Closing Phase:

- Project completed 12<sup>th</sup> July 2025

### 5.12. Synergies and Interdependencies

This project can be shared with other Departments from Organisation that may be interested to implement PM<sup>2</sup> for managing their projects. Certainly, for projects that are shared with other Departments, a working group will be created to agree on how these projects will be managed.

This project will need to interact with other Departments and external entities, namely:

- Organisational Procurement Department for requesting approval for the PM<sup>2</sup> artefacts related to outsourcing activities.
- For on-going projects with one or more outsourced components, the PM<sup>2</sup> methodology need to be explained and agreed on by Contractors.
- External entities (i.e. external to the Organisation) for communicating the changes in the reporting process and artefacts.
- Organisational Governance Bodies, for requesting governance artefacts approval such as for the Business Case, Project Charter, Project Progress Report and Project-End Report.
- Organisational Project Management Office to start covering Department' projects in their monitoring and control process.

### 5.13. Enablers

Enabler	Yes/No	Reference	If No, briefly explain the reason
PM <sup>2</sup>	Yes	<a href="#"><i>PM<sup>2</sup> Project Management Methodology</i></a> <Insert Organisational Document Repository Location, as needed>	

## 6. Governance

### 6.1. Project Owner (PO)

Head of Department.

### 6.2. Solution Provider (SP)

Head of Sector of Department.

### 6.3. Approving Authority

Project Owner – Head of Department.

Signature of the approving authority ..... Date .....

**Appendix 1: References and Related Documents**

ID	Reference or Related Document	Source or Link/Location
1	01.Project_Initiation_Request.Improvement of PM practice.18-01-2025.v1.1.docx	<i>&lt;Insert Project Repository Location&gt;</i>
2	Project folder	<i>&lt;Insert Project Repository Location&gt;</i>
3	<i>&lt;Insert organisational decision name and description, as needed&gt;</i>	<i>&lt;Insert Organisational Document Repository Location, as needed&gt;</i>

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Organisation [Name]  
Department [Name]

# Project Charter

## Improvement of PM Practice

Date: 23/06/2025  
Doc. Version: 1  
Template Version: 3.1



*This template is based on PM² V3.1*

**Document Control Information**

Settings	Value
Document Title:	Project Charter
Project Title:	Improvement of PM Practice
Document Author:	<Insert First Name Last Name>
Project Owner:	Head of <Insert Department Name>
Project Manager:	<Insert First Name Last Name>
Doc. Version:	1
Sensitivity:	Public, Basic, High
Date:	23/06/2025

**Document Approver(s) and Reviewer(s):**

NOTE: All Approvers are required. Records of each approver must be maintained. All Reviewers in the list are considered required unless explicitly listed as Optional.

Name	Role	Action	Date
<Insert First Name Last Name>	Project Owner	Approved	22/02/2025

**Document history:**

The Document Author is authorized to make the following types of changes to the document without requiring that the document be re-approved:

- Editorial, formatting, and spelling
- Clarification

To request a change to this document, contact the Document Author or Owner.

Changes to this document are summarized in the following table in reverse chronological order (latest version first).

Revision	Date	Created by	Short Description of Changes
1.1	22/02/2025	<Insert First Name Last Name>	Minor update of Section 2.2

**Configuration Management: Document Location**

The latest version of this controlled document is stored in <Insert Departmental Document Repository Location>.

## 1. Executive Summary

The adoption of PM<sup>2</sup> in the Department will increase the maturity of project management within the Department and respond to identified issues such as unsuccessful projects, waste of resources, lack of control of outsourced projects and poor quality of deliveries. The current situation has already impacted on the image and reputation of the Department by external entities and on the achievement of organisational objectives for the running programme.

A new programme is starting in the beginning of 2025 + 1 year.

The chosen solution (adoption of the PM<sup>2</sup> methodology) is the recommended project management methodology of the Organisation, aligned with the rationalisation exercise.

Concluding, the adoption of the PM<sup>2</sup> methodology is the solution that gives the greater outcomes with a smaller budget, and it is aligned with the corporate Decision for managing projects at the Organisation.

## 2. Considerations on the Business Case

Ad-hoc approaches for managing several projects within the Department cause miscommunication, lack of stakeholder engagement, inefficiencies, duplication of work, poor planning and controlling of project work within the Department, as well as with Contractors. This (often) leads to frustration, cost and schedule overruns, low quality of deliverables, increased risk of project failure, unsatisfied stakeholders/users and disputes with contractors.

An improved maturity of project management within the Department is urgent because a significant number of projects failed, are substantially delayed or exceed the planned budgets. Additionally, a new programme is starting in the beginning of 2025 + 1 year and will request that the project management methodology is operational and well understood on the 1<sup>st</sup> of January 2025 + 1 year.

The selected alternative to implement the solution is the adoption of PM<sup>2</sup> in the Department, as it is already a methodology tailored to the organisational business environment and complying with the organisational Project Management methods and standards. Moreover, PM<sup>2</sup> is a Project Management Methodology developed by the European Commission, it is an open-source methodology, and it provides many guidelines and templates to facilitate the management and documentation of the projects. Considering this, competences are available in-house, and costs will be lower than implementing other internationally established standard.

Most of the benefits are obtained on medium and long term and can be only correctly measured after project closure. Despite this, the estimation of the benefits comprises no need of further resources to manage the new programme, reduction of the costs on outsourced contracts and ability to cover more projects within the budget and to achieve more outcomes.

The outcomes that can be expected from this project are:

- Increased project productivity (ability to cover more projects in the new programme).
- Improved quality of project deliverables, so policy objectives are achieved more effectively.
- Improved project stakeholder engagement (Business Managers and Project Owners are deeply involved from the beginning of the project and Senior Management is regularly monitoring projects performance and benefits).
- Increased successful projects within Department, by improved monitoring, control and reporting on projects. Projects monitoring and control will be also performed by the Project Support Team and by the organisational Project Management Office (PMO), so different entities will perform quality assurance activities (e.g. phase-exit reviews) in order to increase the probability of projects success.

- Maximisation of investments value by better visibility of project needs, benefits, impact, synergies, costs and risks by the Senior Management. PM<sup>2</sup> will enable projects within Department to effectively follow organisational governance project approval process, as it makes project management processes standard and mandatory.
- Improved control of outsourcing activities and increased quality of Contractors deliverables. PM<sup>2</sup> provides artefacts to control outsourcing activities and processes to lead to deliverables acceptance in an effective way.
- A common project management language that will facilitate the management of projects within several Departments or Organisations (PM<sup>2</sup> is widespread at many organisations).
- Improved image of the Department and Organisation by achieving to greater projects results.

### 3. Project Description

#### 3.1. Scope

##### 3.1.1. Includes ("IN" Scope)

The rolling-out of the project management methodology (PM<sup>2</sup>) in Department for all new and running projects (started from July 2025) includes:

- Tailoring the PM<sup>2</sup> methodology to Department' needs.
- Executing a pilot project to identify any issues.
- Creating a collaboration space and a central project repository.
- Creating a Project Support Team.
- Defining and implementing a complete roadmap for organisational change.
- Providing training to all Department staff.

##### 3.1.2. Excludes ("OUT" Scope)

The envisaged solution WILL NOT COVER the implementation of a Project Management Information System to support the PM<sup>2</sup> methodology. This can be foreseen in a next phase, but not included in the scope of this project. Also, the support and training on the PM<sup>2</sup> methodology to the organisational Project Management Office and to other Departments are not covered by this project.

##### 3.1.3. Scope Statement

Rolling out of the Project Management Methodology (PM<sup>2</sup>) in the Department for all new and running projects, including training staff involved in projects and creation of a project management governance structure and tools (i.e. Project Support Team, project repository and Department collaboration space).

#### 3.2. Success Criteria

- Core set of project management templates are used by 90% of the projects within the Department (measured at the end of the project).
- All projects are archived in the Project Repository.
- The Project Support Team is timely supporting all the staff requests (requests replied in 2 working days maximum).
- The Department Collaboration tool is available 90% of the time and the templates available are up to date.
- Project management templates (i.e. Business Case, Project Charter, Project Progress Report and Project-End Report) are approved by the Organisational Governance Bodies.
- All existing procedures and templates for contractors are reviewed, updated and agreed with the Organisational Procurement Department.
- 90% of Project Managers and 50% of staff involved in projects are trained.
- 70% of the Project Managers are project management certified.

### 3.3. Stakeholder and User Needs

ID	Need Description	Priority
1	Department staff (particularly the Heads of Sector) demand an improved maturity of project management in the Department (quality of project outputs, effectiveness and efficiency of project work and project management processes).	Very High
2	Senior Management demands improved projects monitoring and reporting in order to make more informed and rational decisions on investments. Head of Sectors find it hard to collect information for reporting and the current Department's performance is below objectives.	Very High
3	Business Managers cannot get the expected results from Outsourcers. An improved management of Contractors will have a substantial positive effect on the projects' cost and on the quality of Contractors deliverables.  Additionally, ad-hoc project management approaches are not compliant with the processes and requirements of the Procurement Department.	Very High
4	A new programme is starting in the beginning of 2025 + 1 year and the budget is very tight for the expected number of projects. This new programme will oblige the consolidation and reporting of information to external entities and to other organisations, so a unique methodology will reduce the cost to perform the reporting process.	Very High
5	Projects that are covering different teams need to share the same project management approach.	High
6	Projects are not following organisational governance process.	High
7	The Internal Audit Services identified nonconformities in the last audit, stating that the use of ad-hoc project management approaches could lead to situations of fraud in the granting process.	Very High
8	The Project Management Office of the organisation is demanding the use of a standard methodology, in order to be able to monitor and control projects from Department.	High

### 3.4. Deliverables

ID	Deliverable Name	Deliverable Description
1	Tailoring of PM <sup>2</sup> to Department' needs	This deliverable will include the following sub-deliverables: <ul style="list-style-type: none"> <li>PM<sup>2</sup> processes, guidelines, artefacts and governance model tailored to Department' needs.</li> <li>Project management artefacts for monitoring Department's outsourced projects.</li> <li>Project management artefacts for reporting to external entities.</li> <li>Reviewed Department roles and responsibilities.</li> </ul>
2	Department Collaboration tool	Creation of a Collaboration tool for making available all PM <sup>2</sup> processes, guidelines, artefacts and governance model.
3	Central Project Repository	Creation of a Project Repository for all projects within the Department. This repository will follow a defined configuration management process, aligned with the document and configuration management procedures already in place in Organisation. The Project Repository will include a Lessons Learned repository.
4	Set-up of a Project Support Team	The Project Support Team will be managed by staff and the tasks will be performed by an internal contractors. The main roles of this team are:

		<ul style="list-style-type: none"> <li>• Advice Department staff on PM<sup>2</sup> methodology and provide guidance on administrative services related to project management.</li> <li>• Monitoring projects performance and produce consolidated reporting to the Head of Sectors and to the Head of Department.</li> <li>• Review the reporting to external entities, in order to guarantee the quality of the deliverables.</li> <li>• Manage the content of the collaboration tool, including updating the artefacts templates for continuous improvement.</li> <li>• Guarantee the correct application of the configuration management process in the Project Repository.</li> <li>• Be the first level support for PM<sup>2</sup> methodology and centralise the contact to organisational PMO (second level support).</li> <li>• Perform reviews of projects within the Department, in terms of verifying the compliance with the project management methodology and corporate processes.</li> </ul>
5	PM <sup>2</sup> Transition Management	<p>This deliverable will include the following sub-deliverables:</p> <ul style="list-style-type: none"> <li>• Definition of the roadmap and procedures for all running and new projects.</li> <li>• Execution of a pilot project and follow-up of the entire lifecycle of the project.</li> <li>• Follow-up of running projects transition.</li> <li>• Execution of a Workshop.</li> </ul>
6	PM <sup>2</sup> Business Management	<p>This deliverable will include the following sub-deliverables:</p> <ul style="list-style-type: none"> <li>• Production of the Communication material.</li> <li>• Execution of internal awareness sessions.</li> <li>• Coordination of the training programme.</li> <li>• Communication/interaction with external entities.</li> <li>• Project Support Team activities.</li> </ul>
	Training	<p>This deliverable will be part of the business implementation plan and includes the following sub-deliverables:</p> <ul style="list-style-type: none"> <li>• Training of all Project Managers, Business Managers and Project Core Team members (total of 20 people) to the level 1 of PM<sup>2</sup> Certification.</li> <li>• Training 5 Project Managers to the level 2 of PM<sup>2</sup> Certification.</li> <li>• Training 5 Head of Sectors, 1 Deputy of the Head of Department and 1 Head of Department through the PM<sup>2</sup> for Management path.</li> </ul>

### 3.5. Features

Related Need	Features	Deliverable(s)
1	<p>PM<sup>2</sup> processes, guidelines, artefacts and governance model tailored to Department' needs for managing the entire projects lifecycle.</p> <p>Collaboration tool for making available all PM<sup>2</sup> processes, guidelines, artefacts and governance model to Department staff.</p> <p>Project and Lessons Learned Repository for all projects within the Department.</p> <p>PM<sup>2</sup> first level support.</p>	<ul style="list-style-type: none"> <li>• Tailoring of PM<sup>2</sup> to Department's needs</li> <li>• Department Collaboration tool</li> <li>• Central Project Repository</li> <li>• Set-up of a Project Support Team</li> </ul>

	Implementation of the Department' organisational change through awareness sessions, training, communication to external entities and production of communication material.	<ul style="list-style-type: none"> <li>• PM<sup>2</sup> Business Management</li> <li>• Training</li> </ul>
2	<p>PM<sup>2</sup> artefacts and processes for monitoring, control and report on project performance.</p> <p>Tailored PM<sup>2</sup> artefacts and processes for reporting to external entities.</p> <p>Project Support Team: consolidated reporting to the Head of Sectors and to the Head of Department, perform reviews of projects within the Department and review the reporting to external entities.</p> <p>Awareness sessions.</p> <p>PM<sup>2</sup> training courses for Management.</p>	<ul style="list-style-type: none"> <li>• Tailoring of PM<sup>2</sup> to Department's needs</li> <li>• Set-up of a Project Support Team</li> <li>• PM<sup>2</sup> Business Management</li> <li>• Training</li> </ul>
3	<p>PM<sup>2</sup> artefacts for monitoring Department' outsourced projects.</p> <p>Awareness session for Contractors.</p>	<ul style="list-style-type: none"> <li>• Tailoring of PM<sup>2</sup> to Department' needs</li> <li>• PM<sup>2</sup> Business Management</li> </ul>
4	<p>PM<sup>2</sup> processes, guidelines, artefacts and governance model tailored to Department' needs for managing the entire projects lifecycle.</p> <p>Tailored PM<sup>2</sup> artefacts and processes for reporting to external entities.</p> <p>Project Support Team: consolidated reporting to the Head of Sectors and to the Head of Department, performs reviews of projects within the Department and reviews the reporting to external entities.</p>	<ul style="list-style-type: none"> <li>• Tailoring of PM<sup>2</sup> to Department' needs</li> </ul>
5, 6, 7 and 8	PM <sup>2</sup> processes, guidelines, artefacts and governance model tailored to Department' specificities for managing the entire projects lifecycle.	<ul style="list-style-type: none"> <li>• Tailoring of PM<sup>2</sup> to Department's needs</li> </ul>

### 3.6. Constraints

- Limited support available from PM<sup>2</sup> experienced organisational PMO experts.
- Limited availability of the Department staff and Senior Management for trainings, awareness sessions and workshops, due to a busy agenda.
- The methodology must be delivered by the end of the year (31st December 2025).
- Projects within Department should not be impacted more than 2% on project schedule, in result of the new methodology.
- Availability of the Management of the Organisational Procurement Department for the alignment of project controls while working with Contractors.
- Large tailoring of the chosen project management methodology is only foreseen for exceptional situations.

### 3.7. Assumptions

- No major changes on the chosen project management methodology during project duration.
- Coaching and support will be available from Organisational PMO to Department' staff throughout the duration of the PM<sup>2</sup> Adoption.
- Sufficient training options available within the Organisational PMO PM<sup>2</sup> training calendar.
- Buy-in from Department and Organisational Senior Management (recognition of the need for a project management methodology).

- Willingness and availability of Senior Management for a high-level awareness and training session.
- Training room and training material availability for the selected project management method.
- The project will receive appropriate resources (financial and Human Resources).

### 3.8. Risks

ID	Risk Description & Details	Status	Likelihood <sup>1</sup>	Impact <sup>2</sup>	Risk Level <sup>3</sup>	Risk Owner	Risk Response Strategy <sup>4</sup>	Action Details
1	Resistance to change that will result on Project Managers not following the methodology.	Approved	2	4	8	PO	Reduce	The project is planning 3 actions related to this risk: 1. One awareness session at the beginning of the executing phase and one workshop before PM <sup>2</sup> becomes officially operational, for collecting issues and recommendations from the transition experience. 2. Training sessions for PMs that will enable them to follow the methodology. 3. Project Support Team: will support PMs in the use of the methodology and act as a facilitator to the change process.
2	The chosen methodology is not fitting Department' needs and major tailoring is needed, impacting the delivery date.	Approved	2	5	10	PO	Reduce	Performance of a Pilot project to verify adequacy of the methodology to the Department' projects. This pilot will be an internal project that will start in March until May 2025. Regular follow-up will guarantee that issues are timely identified and acted-upon.
4	A new release of the chosen project management methodology is delivered during project lifecycle, resulting into two situations: adapting to the new release or use an outdated version.	Waiting for Approval	4	4	16	PO	Reduce	Meeting with Organisational PMO PM <sup>2</sup> team to identify the planning for next releases or updates.
5	Delay of more than 2% on	Approved	3	4	12	PO	Reduce	Project Support Team: will support PMs in the use of the

<sup>1</sup> A numeric value denoting the relative probability that the risk should occur.

<sup>2</sup> A numeric value denoting the relative severity of the impact of the risk if it should occur.

<sup>3</sup> The risk level is the product of the likelihood and impact (RL=L\*I).

<sup>4</sup> The possible risk response strategies are: Avoid/ Transfer or Share/ Reduce / Accept.

ID	Risk Description & Details	Status	Likelihood <sup>1</sup>	Impact <sup>2</sup>	Risk Level <sup>3</sup>	Risk Owner	Risk Response Strategy <sup>4</sup>	Action Details
	schedule for some projects within Department, during implementation.							methodology and act as a facilitator to the change process. Additionally, this team will monitor projects and recommend actions to the Project Steering Committee (PSC).
6	Decrease in productivity due to learning curve effects that will impact projects schedules.	Approved	3	3	6	PO	Accept	This impact is expected, and a delay is already foreseen (less than 2% on schedule).
7	Lack of support from key-stakeholders that will result on limited adherence to the new methodology.	Approved	2	4	8	PO	Reduce	The project is planning awareness sessions, workshops and training sessions to involve all the stakeholders. Additionally, communication material will be delivered to support the change. Moreover, a Project Support Team will follow the adherence to the methodology and identify any issue if occurs. Other Departments, Contractors and external entities will be involved in working groups, awareness sessions and tailored communications.
8	Unavailability of courses for the selected project management method (fully booked) that will delay training activity.	Investigating				PO		
9	Delays on Contractors' projects caused by the mismatch of the methodology with the project management approach of Contractors.	Approved	3	4	12	PO	Reduce	For the running projects, meetings with Contractors will be planned to present the methodology and agree on the expected outputs.  For all projects, each Contractor will be able to attend an awareness session.
10	Lack of support from other Departments, such as Procurement Department.	Approved	1	4	4	PO	Accept	The likelihood for this risk is very low. Additionally, the project plans the creation of a Working Group to align objectives and requirements. Awareness sessions will be also delivered.
11	Lack of available budget caused by delays in	Approved	2	5	10	PO	Reduce	As the Project Core Team is already working in the Department within allocated

ID	Risk Description & Details	Status	Likelihood <sup>1</sup>	Impact <sup>2</sup>	Risk Level <sup>3</sup>	Risk Owner	Risk Response Strategy <sup>4</sup>	Action Details
	yearly budget approval.							budget line and this budget has not been all spent, this risk is unlikely to happen.
1 2	Unavailability of resources with the necessary skills.	Approved	1	5	5	PO	Accept	This risk is unlikely to happen, as the project will be supported by Organisational PMO – PM <sup>2</sup> Team and a training programme is foreseen for the Project Core Team (PM <sup>2</sup> Practitioner certified).

#### 4. Cost, Timing and Resources

##### 4.1. Cost

This project will be mainly executed by 2 staff (0.5 FTE) and 2 internal contractors in the first year and maintained by 1 internal contractor and 0.2 FTEs of a staff, from the Department. Support/coaching will be performed by Organisational PMO during the project. The cost of the PM<sup>2</sup> courses is supported by Organisational HR, if delivered internally. So, the estimated training cost is only including the cost of the certification exams. The PMO Team will perform the 2 awareness sessions and give coaching throughout the project.

The budget lines that will be used for this project are XX 01 02 11 04 and XX 01 02 11 06. The project will have an estimated total cost of 39 K€ + 0.7 FTE for 2025 and a TCO of 105 K€ + 1.5 FTE.

	202X		202(X+1)		202(X+2)		202(X+3)		202(X+4)		
Expenditure	Budget Line	Amount <sup>5</sup>	Budget Line	Amount	Budget Line	Amount	Budget Line	Amount	Budget Line	Amount	Total cost
Solution Development <sup>6</sup> (k€)	XX 01 02 11 04	33 K€									47 K€
Solution Maintenance <sup>7</sup> (k€)			XX 01 02 11 04	16.5 K€	XX 01 02 11 04	16.5 K€	XX 01 02 11 04	16.5 K€	XX 01 02 11 04	16.5 K€	66 K€
Support <sup>8</sup> (k€)	XX 01 02 11 04	0.2 FTE									0.2 FTE
Training <sup>9</sup> (k€)	XX 01 02 11 06	6 K€									6 K€
Infrastructure <sup>10</sup> (k€)											
<b>Total per year (k€)</b>		39 K€		16.5 K€		16.5 K€		16.5 K€		16.5 K€	<b>105 K€</b>
<b>Total per year FTE officials<sup>11</sup></b>		0.5 FTE + 0.2 FTE		0.2 FTE		0.2 FTE		0.2 FTE		0.2 FTE	<b>1.5 FTE</b>

**Note:** In this project, the total FTE per year represents the time spent by staff or other resources that are not directly a euro cost to the project. In 2025, there is also the effort of the PMO Team (Support) represented on the budget.

<sup>5</sup> If you cannot provide an amount, provide at least a qualitative statement (e.g. 20 days of training, 2 laptops, etc.)

<sup>6</sup> Development: provide the total (anticipated) cost (human resources) for the development of the solution

<sup>7</sup> Maintenance: provide the total (anticipated) cost (human resources) in K€ per year to maintain the solution

<sup>8</sup> Support: provide the total (anticipated) cost (human resources) in K€ per year to support the solution (e.g. website, helpdesk, operations, etc.)

<sup>9</sup> Training: provide the total (anticipated) cost (human resources) to ensure the training of the users, the support and operations staff, etc.

<sup>10</sup> Infrastructure: provide the total (anticipated) cost of the infrastructure required to deliver, support, operate and maintain the delivered solution.

<sup>11</sup> Total FTE staff: provide the total (anticipated) effort that will be spent by staff on the project (in man-weeks, man-months or man-years).

#### 4.2. Timing and Milestones

ID	Milestone Description	Target Delivery Date
	<b>Initiating Phase</b>	<b>22 February 2025</b>
1	Definition of the context, impact and outcomes of the envisaged solution	18 January 2025
2	Business Case approved	01 February 2025
3	Project Charter approved	22 February 2025
	<b>Planning Phase</b>	<b>15 March 2025</b>
4	Project planning artefacts approved	15 March 2025
	<b>Executing Phase</b>	<b>5 July 2025</b>
5	Identification of the gap between "As is" and "To be" and creation of a working group for interaction with other Departments	15 March 2025
6	Executing Kick-off Awareness Session	15 March 2025
7	Communication material delivered	15 April 2025
8	Approval of the tailored PM <sup>2</sup> Methodology by the Organisational Project Management Board	16 April 2025
9	Approval of the Transition Roadmap and Procedures	16 April 2025
10	Creation of the Department' PM <sup>2</sup> Collaboration tool and project repository	23 April 2025
11	Project Support Team officially operational	29 April 2025
12	Training completed	07 May 2025
13	Awareness Sessions completed	10 May 2025
14	Execution of the pilot completed	26 June 2025
15	Follow-up of running projects transition completed	02 July 2025
16	Workshop performed	05 July 2025
17	Formal deliverables acceptance	05 July 2025
	<b>Closing Phase</b>	<b>12 July 2025</b>
18	Project Final Acceptance	11 July 2025
19	Project closed	12 July 2025

### 4.3. Planned Resources

ID	Resource Requirement	Description
1	1 Project Manager from Department	This resource will act as the Project Manager of this project. The effort for this project will be 0.3 FTE. Ideally, the Project Manager will be a Head of Sector.
2	1 Business Manager from Department	This resource will manage the business implementation, including awareness sessions, training, communication material, and the relation with contractors, external entities and other Departments / Organisations. Ideally, the Business Manager will be a Head of Sector. The effort for this project will be 0.2 FTE.
3	2 Resources with Project Manager profile from Department	2 internal contractors that are currently working as Project Managers and have the necessary skills to execute the project (already familiar with the PM <sup>2</sup> methodology).
4	1 PM <sup>2</sup> Trainer	The requested training sessions are available internally and training is managed by organisational HR. So, this resource is available via the training services.
5	2 PM <sup>2</sup> Experts	Two PM <sup>2</sup> Experts to follow the project and give support when requested (number of hours agreed for each activity).

## 5. Approach

### 5.1. Methodology

This project will follow the PM<sup>2</sup> Methodology for all project activities.

### 5.2. Change Management

The change management, configuration management and organisational change for this process will follow the PM<sup>2</sup> Methodology.

#### 5.2.1. Project Change

The change management process for this project is a five-step process and falls under the responsibilities of the Project Manager who should execute the process when required throughout the project lifecycle:

- **Change Identification:**  
A request for a change can be submitted formally via a Change Request Form or can be identified and raised during meetings as a result of decisions, issues or risks. All changes are registered in the Change Log.
- **Change Assessment and Action Recommendation:**  
The evaluation of a project change will be documented by the Project Manager in the Change Log, which is then used as an input to the formal change approval by the appropriate decision makers (via a Change Request Form).
- **Change Approval:**  
The approval of a project change will follow the escalation process for this project, detailed in the Project Handbook.  
For changes which do not have significant impact on delivery time and budget, the changes can be approved during the Project Follow-up Meetings. Other changes (with High and very High Size) are approved by the Project Steering Committee (PSC).
- **Change Implementation:**  
The activities related to the implementation of changes and their status will be documented in the Project Work Plan.
- **Change Control:**  
New or open changes will be identified/reassessed weekly during the Project Follow-up Meetings and the Project Manager will then update the Change Log with the results of the analysis/review. For the Medium, High and very High Size changes, the Project Manager will report monthly their status to the Project Steering Committee (PSC) and, when adequate, to other project stakeholders.

#### 5.2.2. Configuration Management

The project configuration management procedure will be used to manage deliverables effectively and to provide a single reliable reference to them, ensuring that the correct versions are delivered to the Project Owner.

This project will use the following file naming convention:

Files: (XX).(DocumentName).(ProjectName).(dd-mm-yyyy).v(x.x)

Project email subject tag: (ProjectName), (Topic), (type of communication, e.g. for approval, for information, for review, for action), (FreeText – if needed).

The location of the approved versions of project artefacts and deliverables is in the project repository <Insert Project Repository Location>.

For this project, the Project Manager (PM) will structure the project management artefacts per PM<sup>2</sup> phase, following the below folder convention:

- 01 Initiating
- 02 Planning
- 03 Executing
- 04 Monitor & Control
- 05 Closing

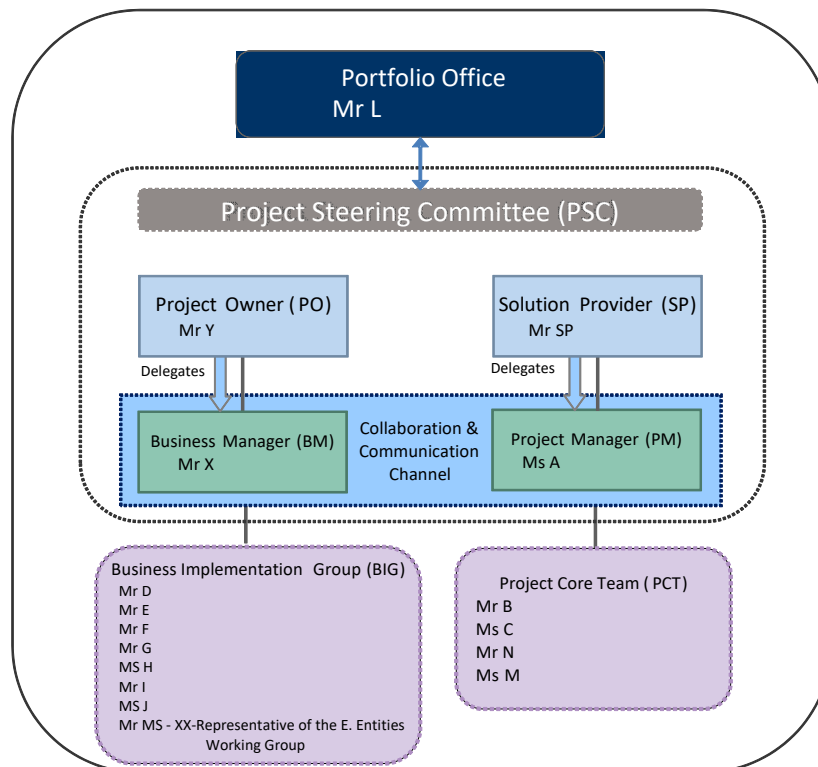
### 5.2.3. Organisational Change

The organisational change process will be documented in the Business Implementation Plan, by the Business Manager. This artefact will identify the approach and planning related to the following activities: awareness sessions, training, workshop, communication material, and the interactions with vendors, external entities and other Departments/Organisations.

## 6. Governance and Stakeholders

### 6.1. Structure

This project will follow the standard PM<sup>2</sup> project structure.



### 6.2. Roles and Responsibilities

This project will follow the standard PM<sup>2</sup> Roles and Responsibilities and there are no deviations from the standard Roles, except for the Project Support Team, which will be created as an output of this project. The main responsibilities of this Team will be:

- Advice Department staff on PM<sup>2</sup> methodology and provide guidance on administrative services related to project management.

- Monitoring projects performance and produce consolidated reporting to the Head of Sectors and to the Head of Department.
- Review the reporting to external entities, in order to guarantee the quality of the deliverables.
- Manage the content of the collaboration tool, including updating the artefacts templates for continuous improvement.
- Guarantee the correct application of the configuration management process in the Project Repository.
- Be the first level support for PM<sup>2</sup> methodology and centralise the contact to Organisational PMO team (second level support).
- Perform reviews of projects within the Department, in terms of verifying the compliance with the project management methodology and corporate processes.

### 6.3. Other Stakeholders

The other relevant stakeholders identified for this project are:

- **Contractors:** They will have to use the PM<sup>2</sup> artefacts.
- **External entities:** These entities will receive an improved report format for the monthly reporting.
- **Procurement Department:** PM<sup>2</sup> artefacts have to be aligned with the procurement process already in place in the Organisation.
- **Organisation' Project Management Office:** This Office will receive regular reporting on projects performance.
- **Organisation' Governance Bodies:** These Bodies will have to approve the Business Case, Project Charter, Project Progress Report and Project-End Report templates.

**Appendix 1: References and Related Documents**

ID	Reference or Related Document	Source or Link/Location
1	02.Business_Case.Roll-out of PM2.31-01-2025.v1.1.docx	<i>&lt;Insert Project Repository Location&gt;</i>
2	Project folder	<i>&lt;Insert Project Repository Location&gt;</i>
3	<i>&lt;Insert organisational decision name and description, as needed&gt;</i>	<i>&lt;Insert Organisational Document Repository Location, as needed&gt;</i>

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Organisation [Name]

Department [Name]

# Project Handbook

## Improvement of PM Practice

Date: 23/06/2025

Doc. Version: 1

Template version: 3.1



*This template is based on PM² V3.1*

**Document Control Information**

Settings	Value
Document Title:	Project Handbook
Project Title:	Improvement of PM Practice
Document Author:	<Insert First Name Last Name>
Project Owner:	<Insert First Name Last Name>
Project Manager:	Not yet Assigned
Doc. Version:	1
Sensitivity:	Public, Basic, High
Date:	23/06/2025

**Document Approver(s) and Reviewer(s):**

NOTE: All Approvers are required. Records of each approver must be maintained.

All reviewers in the list are considered required unless explicitly listed as Optional.

Name	Role	Action	Date
<Insert First Name Last Name>	Project Owner	Approved	15/03/2025

**Document history:**

The Document Author is authorized to make the following types of changes to the document without requiring that the document be re-approved:

- Editorial, formatting, and spelling
- Clarification

To request a change to this document, contact the Document Author or Project Owner.

Changes to this document are summarized in the following table in reverse chronological order (latest version first).

Revision	Date	Created by	Short Description of Changes
1.1	01/03/2025	<Insert First Name Last Name>	Minor update of Section 2.2

**Configuration Management: Document Location**

The latest version of this controlled document is stored in <Insert Departmental Document Repository Location>.

## 1. About the Project Handbook

The Project Handbook summarises the project objectives and documents the selected approach for implementing the project goals. It also highlights the key controlling processes to be used, the project policies and rules, and the overall management approach. The project scope statement (from the Project Charter) is a key input for this document.

The Project Handbook is an important document since it defines the outputs of the planning (i.e. it defines the plans necessary for managing the project as well as to what extent they should be customised or/and tailored).

The Project Handbook becomes the basis for managing the project throughout its lifecycle and is an important point of reference for all project members and stakeholders. The Project Handbook should be kept up to date throughout the life of the project. During the Closing Phase, the Project Handbook becomes an important point of reference for the Project-End Review Meeting, and should be properly closed and archived.

## 2. Project Overview

### 2.1. Project Objectives

The selected solution is the adoption of PM<sup>2</sup> in the Department. Moreover, PM<sup>2</sup> is a Project Management Methodology developed by the European Commission, it is an open-source methodology, and it provides many guidelines and templates to facilitate the management and documentation of the projects. This methodology is already tailored to the use in both public and private sectors.

The adoption of PM<sup>2</sup> will increase the maturity of project management within the Department and respond to identified issues such as unsuccessful projects, waste of resources, lack of control of outsourced projects and poor quality of deliveries. Additionally, Senior Management demands improved projects monitoring and reporting in order to make more informed and rational decisions on investments.

The current situation has already impacted the image and reputation of the Department by External Entities and on the achievement of the Organisation objectives for the running programme. A new programme is starting in the beginning of 2025 + 1 year and will request that the project management methodology is operational and well understood on January 1 2025+1.

To conclude, the main project objectives are:

- Increased maturity of project management within the Department:
  - Project governance model in place.
  - Standard project management lifecycle, processes and artefacts in place.
  - Skilled resources on project management.
- Increased projects' productivity (ability to cover more projects in the new programme).
- Improved quality of project deliverables, so policy objectives are achieved more effectively.
- Improved monitoring, control and reporting on projects, resulting in the maximisation of investments value.
- Improved control of outsourcing activities and increased quality of contractors deliverables.
- Roll-out of the methodology for the new programme (fully operational on January 1 2025+1).
- Improved image of the Department and the Organisation by achieving greater projects results.

## 2.2. Critical Success Factors and Project Management Objectives

### Critical Success Factors

- Core set of project management templates are used by 90% of the projects within the Department (measured at the end of the project).
- All projects are archived in the Project Repository.
- The Project Support Team is timely supporting all the staff requests (requests replied in 2 working days maximum).
- The Departmental Collaboration tool is available 90% of the time and the templates available are up to date.
- Project management templates (i.e. Business Case, Project Charter, Project Progress Report and Project-End Report) are approved by the Organisational Governance Bodies.
- All existing procedures and templates for contractors are reviewed, updated and agreed with the Organisational Procurement Department.
- 90% of Project Managers and 50% of staff involved in projects are trained.
- 70% of the Project Managers are project management certified.

### Additional Project Management Objectives

This project will also enable the achievement of the following results that are not initially in the scope of this project, namely:

- The adoption of the PM<sup>2</sup> methodology may inspire other Departments within the Organisation to use PM<sup>2</sup>. In fact, there is the opportunity to turn PM<sup>2</sup> the official project management methodology at the Organisation.
- The roll-out of PM<sup>2</sup> in the Department can serve as an example (pilot) for other Departments. The project itself is applying the PM<sup>2</sup> methodology and the approach is to well document all the project activities, pitfalls, recommendations and lessons learned in order to be used by other Departments.
- The close collaboration with the Organisation during the project can be extended in the future to an exchange of experiences and the Department can become an active and relevant contributor in the PM<sup>2</sup> Community of Practice. In result, the project management expertise within the Department will grow in a sustainable way.

### 2.3. Project Stakeholders

The main stakeholders of this project are the project management practitioners (from Department and from the other Departments that have shared projects), the Department' Business Managers with outsourced projects and their Management. These stakeholders will be highly impacted by this project, as it will change the way of performing their work activities.

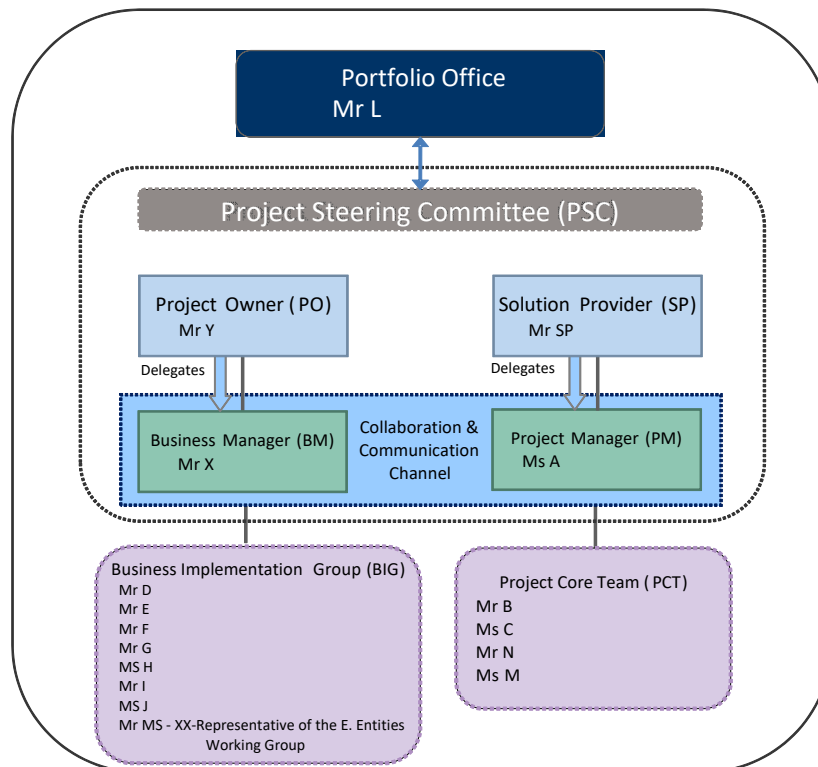
Additionally, this project consider other relevant stakeholders such as the Portfolio Office, the Project Management Office, the Project Management Board and the Procurement Department, as internal stakeholders, and the Department' Contractors and External Entities, as external ones.

The Portfolio Office and the Project Management Board will review the PM<sup>2</sup> governance artefacts and approve them. The Project Management Office will use the PM<sup>2</sup> reporting artefacts for monitoring and control projects. The Procurement Department will participate in the project for aligning the PM<sup>2</sup> outsourcing artefacts with the procurement directives.

Contractors will be impacted as they need to use the PM<sup>2</sup> artefacts (at least the reporting ones) in their projects.

Finally, External Entities will be slightly impacted as the reporting artefacts will be updated.

As shown below, the main stakeholders are included in the project team:



The complete list of Stakeholders should be described in the Project Stakeholder Matrix.

#### 2.4. Project Dependencies or Interrelations

Currently, the Department is sharing 3 projects with other Departments that are not using PM<sup>2</sup> for managing their projects. Until now, the approach for managing these projects is to agree on some artefacts and then each team manages its tasks independently. This situation has already created some problems in terms of not considering all the requirements and effort for the project, particularly on quality, transition and business implementation processes. To improve the current situation, this project foresees the creation of a Working Group to apply PM<sup>2</sup> for projects that are involving this Department and other Departments.

For on-going projects with one or more outsourced components, the PM<sup>2</sup> methodology needs to be explained and agreed on by outsourced contractors. In result, project planning will consider a round of meetings with outsourced contractors, and the result of these meetings will impact the artefacts used for these projects. Also, the PM<sup>2</sup> methodology needs to be aligned with the organisational Procurement procedures (if applicable). This will be performed in a round of meetings to validate if the PM<sup>2</sup> processes and procedures are aligned with the Procurement Department.

Projects from this Department are run under the programme and they involve External Entities. The status of these projects is reported monthly to the External Entities in an agreed reporting format. Nowadays, each team from the Department is reporting the status of projects in a different report format. This situation is inefficient and consuming a lot of resources for consolidated reporting. One of the deliverables of this project is to standardise the reporting process and artefacts within the Department, based on the PM<sup>2</sup> reporting artefacts. These changes will be explained to the External Entities through communication activities.

Other dependency of this project is the need of approval from the Portfolio Office, for the following artefacts templates: Business Case, Project Charter, Project Progress Report and Project-End Report. The interactions with this Office will be performed by a formal request of approval, followed by a review of artefacts considering suggestions (if needed), and the request of the final approval from the Organisation Project Management Board.

Finally, Organisation Project Management Office is requesting to cover Department' projects in their monitoring and control process. Although this request is not in the scope of this project, a round of meetings should be undertaken to explain the PM<sup>2</sup> main artefacts and which information can be used for monitoring and control. In fact, the Project Management Office can be a driver to the adoption of PM<sup>2</sup> within the Organisation.

## **2.5. Project Constraints**

The identified constraints for this project are the following:

- Limited support available from Organisation PM<sup>2</sup> experts. The Project Manager needs to agree on an amount of hours for the Organisational Project Management Office (PMO) team and then to allocate the hours per activity.
- Limited availability of the Department staff and Senior Management for trainings, awareness sessions and workshops, due to a busy agenda. The approach to address this constraint is to fix the days for the awareness and training sessions, giving 2 available options for each course. The request for scheduling the training courses will be performed until the 15<sup>th</sup> of March 2025. As awareness sessions and training are mandatory to all staff, an email from the Head of Department will be sent with the directives for register on the training courses.
- The methodology must be delivered by the end of the year (the 31<sup>st</sup> of December 2025). This constraint is not impacting the planning, as the project is estimated to finish in July 2025.
- Projects within the Department should not be impacted more than 2% on their project schedule, in result of the new methodology. The Project Support Office will follow the on-going projects and help the project teams to resolve any issue.
- Availability of the Management of the Organisation' Procurement Department for the alignment of project controls while working with outsourced contractors. A first contact has already occurred and a meeting is planned to happen until the 8<sup>th</sup> March of 2025.
- Extended tailoring of the chosen project management methodology should not be foreseen as PM<sup>2</sup> is already recommended and tailored to the organisational environment and is complying with its specific standards, so light tailoring should be sufficient to cover Department' needs.

## **3. Project Approach**

### **3.1. Project Lifecycle**

This project has started on the 11<sup>th</sup> of January 2025 and is planned to finish on the 12<sup>th</sup> of July 2025, with an estimated duration of 131 days.

The project will follow the PM<sup>2</sup> project management lifecycle, so the phase gate approvals will be performed at the end of the:

- Initiating phase: 22 February 2025.
- Planning phase: 15 March 2025.
- Executing phase: 5 July 2025.
- Closing phase: 12 July 2025.

The phase gate approvals will be performed by the Project Steering Committee, based on the project status, acceptance of deliverables and issues and risks identified during the phase.

### 3.2. PM<sup>2</sup> Tailoring – Required Project Documentation

The following artefacts will be used in this project:

Artefact	Yes/ No	Location	If No, briefly explain the reason
Project Initiation Request	P	<Insert Project Repository Location>	
Business Case	P	<Insert Project Repository Location>	
Project Charter/Vision Document	P	<Insert Project Repository Location>	

Artefact	Yes/ No	Location	If No, briefly explain the reason
Project Handbook ( <i>this document</i> )	P	<Insert Project Repository Location>	
Stakeholder Matrix	P	<Insert Project Repository Location>	
Project Work Plan	P	<Insert Project Repository Location>	
Resource Plan	P	<Insert Project Repository Location>	
Transition Plan	P	<Insert Project Repository Location>	
Business Implementation Plan	P	<Insert Project Repository Location>	
Outsourcing Plan	P	<Insert Project Repository Location>	
Communications Management Plan	P	<Insert Project Repository Location>	
Project Change Management Plan	P	<Insert Project Repository Location>	
Risk Management Plan	P	<Insert Project Repository Location>	
Quality Management Plan	P	<Insert Project Repository Location>	
Issue Management Plan	P	<Insert Project Repository Location>	
Deliverables Acceptance Management Plan	P	<Insert Project Repository Location>	
Risk Log	P	<Insert Project Repository Location>	
Change Log	P	<Insert Project Repository Location>	
Issue Log	P	<Insert Project Repository Location>	

Artefact	Yes/ No	Location	If No, briefly explain the reason
Decision Log	P	<Insert Project Repository Location>	
Minutes of Meeting	P	<Insert Project Repository Location>	
Project Progress Report	P	<Insert Project Repository Location>	
Project Status Report	P	<Insert Project Repository Location>	
Project-End Report	P	<Insert Project Repository Location>	
Phase-exit Review Checklist	P	<Insert Project Repository Location>	
Quality Review Checklist	P	<Insert Project Repository Location>	
Deliverables Acceptance Checklist	P	<Insert Project Repository Location>	
Transition Checklist	P	<Insert Project Repository Location>	
Business implementation Checklist	P	<Insert Project Repository Location>	
Project Acceptance Note	P	<Insert Project Repository Location>	

### 3.3. Other Standards

Additionally to PM<sup>2</sup>, the project will follow other (domain specific) methodologies as described below:

- <For example, an Agile for the management of IT development>;

The following standards were considered when defining project approach:

- <Insert other organisational standards>
- <Insert other organisational standards>

### 3.4. Specific Project Management Rules

Project rules are usually related to defining rules regarding stakeholder/team interactions, communication, meetings, collaboration, contractors, etc., and especially those aspects which cannot be easily covered by the project methodology, communication plan, meeting and reporting templates, or which are very specific chosen project management style.

Project rules can be related to the specific project or overall programme/organisational context, or/and can be derived directly from the project' critical success factors, project management objectives and the PM<sup>2</sup> Mindsets (found in the PM<sup>2</sup> Guide).

Inputs (information) that can be used to define the project rules cover the MoMs of the Project Planning Kick-off Meeting, "pre-project" information, and lessons learned from projects with similar scope, constraints or risks, etc.

### 3.5. Conflict Resolution and Escalations

Typically, conflict can arise in any of the levels below:

- Within the Project Core Team.

- Within a specific domain (e.g. the IT Community).
- With the client/requestor side or the user community.
- With an Outsourced Contractor.>

Conflicts are situations in which one or both parties perceive a threat. They are considered to be critical issues and can be raised by any of the project stakeholders. The Project Management team should proactively identify, log and raise such issues for resolution. When required, conflicts are discussed on the weekly Project Status Meetings or, if needed, escalated to the Project Steering Committee (PSC).

Conflict resolution activities are registered in the *Issue Log*, while conflict resolution decisions can be logged in the *Decision Log*.

The escalation procedure for this project is as following:

- Only issues/changes/risks with Very Low and Low impact can be approved by the Project Core Team (PCT). In this case, the Project Manager (PM) must always be informed and decisions may be registered in the *Decision Log*.
- Issues/changes/risks with Medium impact are approved by the Managing Level (Project Manager and Business Manager) during the weekly Project Status Meetings. Decisions are registered in the *Decision Log*.
- Issues/changes/risks with High and very High impact are approved by the Project Steering Committee (PSC). Decisions are registered in the *Decision Log*.
- When relevant, the Project Steering Committee (PSC) has extraordinary meetings for approving remediation actions related to urgent or very urgent issues with considerable impact or size.

#### 4. Project Processes

##### 4.1. Risk Management

The project risk management process defines the activities to identify, assess, prioritise, manage and control risks that may affect the execution of the project and the achievement of its outputs. This is a four-step process:

- **Risk Identification:** Risks are continuously identified throughout the project lifecycle by any project stakeholder and documented in the Risk Log (by any project team member).
- **Risk Assessment:** Risks are assessed based on their likelihood of occurrence and the impact in project scope and constraints. The product of their likelihood and impact (in five point scales) defines the Risk Level which is then used as a reference for their prioritisation and risk response development.
- **Risk Response Development:** There are four strategies to be considered as risk responses to threats: Avoid, Transfer, Reduce or Accept a risk. After the strategy for each risk has been selected, specific actions to implement the strategy will be defined, described, scheduled and assigned, while a Risk Owner assumes the responsibility for its implementation. These actions will be incorporated into the Project Work Plan.
- **Risk Control:** The Project Status Meetings are used to revise the status of risks, probabilities and impacts, and related actions, and to identify new risks. Risks will be revised weekly, but also after the occurrence of any significant event. If any of the identified risks occur, then the Project Manager (PM) will implement the contingency plans and communicate the issue to the Project Steering Committee (PSC).

##### 4.2. Issue Management

The project issue management process defines the activities related to identifying, documenting, assessing, prioritizing, assigning, resolving and controlling issues. It is a four-step

process that the Project Manager (PM) executes whenever required throughout the project lifecycle:

- **Issue Identification:** Issues can be identified by any project stakeholder throughout the project lifecycle, using different communication channels such as meetings, emails, and reports. The issues are registered in the *Issue Log*.
- **Issue Assessment and Action Recommendation:** A first informal assessment considers the category, impact, urgency and size of the issue, followed by a more detailed analysis to identify the root cause and recommend a solution. This information is documented in the *Issue Log* and used as input to the appropriate decision makers (based on the escalation process). The decision is documented in the *Decision Log*.
- **Actions Implementation:** After issues are evaluated and the remediation actions approved, the Project Manager (PM) will incorporate these actions into the *Project Work Plan* and update project related documentation such as project plans and logs.
- **Issue Control:** Project Status meetings will be performed weekly and used to revise the status of issues and related actions, and to identify new issues. Additionally, the Project Manager (PM) will report monthly the status of the major issues to the Project Steering Committee (PSC) and, when adequate, to other project stakeholders.

#### 4.3. Requirements Management

The requirements management process comprises the activities related to the specification, evaluation, approval, monitoring and validation of the project's requirements. This process consists of the following steps:

- **Specify Requirements:** Gather the project requirements together with the project stakeholders and document them unambiguously in the Requirements Document. Structure them by adding relevant metadata.
- **Evaluate Requirements:** The project team assesses the feasibility of the requirements and estimates the costs to realise them. The Project Manager (PM) balances the list of requirements with the other project constraints (budget, time, etc.) and proposes them to the project stakeholders.
- **Approve Requirements:** The Project Manager (PM) negotiates and agrees the requirements that will be realised during the project with the relevant stakeholders, such as the Project Owner (PO) or the Business Manager (BM). The approved requirements become the baseline of the project scope.
- **Monitor Requirements Implementation:** The Project Manager (PM) continuously monitors the implementation of the requirements by the Project Core Team (PCT), besides the discovery of new requirements or changes to existing requirements.
- **Validate Implemented Requirements:** When the requirements are implemented, the solution is validated by the business user in order to assess if the initial business need is satisfied. Formal acceptance of the project deliverables should comply to the Deliverables Acceptance Management process.

#### 4.4. Project Change Management

The project change management process defines the activities related to identifying, documenting, assessing, approving, prioritising, planning and controlling changes, and communicating them to all relevant stakeholders. It is five step process that the Project Manager a (PM) executes whenever required throughout the project lifecycle:

- **Change Identification:** A request for a change can be submitted formally via a Change Request Form or can be identified and raised during meetings as a result of decisions,

issues or risks. The *Change Log* contains information to identify the change, such as the requestor, a short description, identification date, etc.

- **Change Assessment and Action Recommendation:** The size and impact of the change on the project scope, schedule, cost, quality, risk, and other project boundaries is assessed, where after a recommended action will be documented by the Project Manager (PM) in the *Change Log*. This information is then used as an input to the formal change approval by the appropriate decision makers.
- **Change Approval:** The approval of a project change will follow the defined escalation process for this project. For changes which do not have significant impact on delivery time and budget, the changes can be approved during the Project Status Meetings. Other changes (having a size L or XL) are approved by the Project Steering Committee (PSC). The decision details are documented in the *Change Log*.
- **Change Implementation:** The activities related to the implementation of approved changes will be documented in the *Project Work Plan*.
- **Change Control:** New or open changes will be identified/reassessed weekly during the Project Status Meetings and the Project Manager (PM) will then update the *Change Log* with the results of the analysis/review. For the Medium, High and Very High size changes, the Project Manager (PM) will report on a monthly basis their status to the Project Steering Committee (PSC) and, when adequate, to other project stakeholders.

#### 4.5. Quality Management

The project quality management process comprises all activities (related both to processes and deliverables) that will increase the ability to meet the project expected results identified in the *Project Charter*. The process is comprised of five steps:

- **Define Quality Characteristics:** Identify the objectives, approach, requirements, activities and responsibilities of the project's quality management process and how it will be implemented throughout the project. Quality management activities will be added to the *Project Work Plan*. The *Quality Review Checklist* and *Deliverables Acceptance Checklist* are created during the Planning phase.
- **Perform Quality Assurance:** The quality assurance activities will be performed by evaluating the design of project controls, by confirming that they are implemented, and by assessing their operational effectiveness.

These activities will consider the project quality objectives along with the project risks. In addition, quality assurance validates compliance with the organisational rules and regulations, as well as with relevant governmental and industry rules, regulations and legislation. Quality assurance activities will be performed by a Project Quality Assurance (PQA) person, and by the project organisation (PCT, BM, SP).

- **Perform Quality Control:** The *Quality Review Checklist* will be used by the Project Manager (PM) for evaluating the quality control activities and to validate compliance with the plans in terms of scope, time, cost, quality, project organisation, communication, risks, contracts, and client satisfaction. Additionally, the Project Manager (PM) will summarise and document the *Quality Review Checklist* findings, their impact, recommendations along with any remediation/improvement actions. The project logs will then also be used to document related risks, issues, decisions and changes.
- **Perform Deliverables Acceptance:** The Deliverables Acceptance Checklist supports the monitoring of the status of all activities that are pre-condition to the delivery of project outputs to the Project Owner (PO) and their formal acceptance. Project deliverables are accepted if the acceptance activities are successfully performed and within the pre-specified tolerances. The project deliverables may be conditionally accepted even with a

set of known issues, provided that these are documented and that there is a plan for addressing them.

- **Perform Final Acceptance:** The Project Manager (PM) will report on project performance in the Project-End Review Meeting and develop the *Project-End Report*. The project documentation and records will be updated, reviewed and archived. The final acceptance is obtained from the Project Owner (PO), through the Project Acceptance Note, where after the project end is communicated to all relevant stakeholders.

#### 4.6. Configuration Management

The project configuration management procedure comprises the identification of project configuration items (CIs), their attributes and status codes, the establishment of baselines, the definition of roles and responsibilities for authorised changes to CIs, and the maintenance and control of a project repository.

##### Storage of project management artefacts

The Project Manager (PM) will structure the project management artefacts per PM<sup>2</sup> phase, following the below folder convention:

- 01 Initiating
- 02 Planning
- 03 Executing
- 04 Monitor & Control
- 05 Closing

##### Naming convention of project management artefacts

The following artefact naming convention will be used:

(XX).(DocumentName).(ProjectName).(yyyy-mm-dd).v(x.x), where:

- (XX) (two numerical characters) unique artefact number within the folder indicating the artefact sequence.
- v(x.x) indicates the artefact version. Version numbers like "0.x" mean that the document hasn't been approved yet; minor changes will be reflected in the decimal (revisions number) and major changes (formal reviews) in the version number.

##### Versioning of project management artefacts

All project management artefacts are under version control, except for the project logs and checklists.

#### 4.7. Communications Management

The communications management process determines how to communicate most efficiently and effectively to the various stakeholders. It defines and documents the communication items content, format, frequency, the audience and expected results. It also defines how to communicate project status and the assignment of activities to the various stakeholders, and the communication strategy for each stakeholder, based on their interests, expectations and influence in the project.

The following project meetings will be organised:

Meeting	Chair	Frequency
Planning Kick-off Meeting	Project Manager (PM)	Once
Executing Kick-off Meeting	Project Manager (PM)	Once
Project Status Meeting	Project Manager (PM)	Every 2 weeks
Project Core Team Meeting	Team Leader (TL)	Weekly
Project Review Meeting	Project Manager (PM)	Bi-annually

Project Steering Committee Meeting	Project Owner (PO)	Monthly
Change Control Meeting	Project Manager (PM)	Ad Hoc
Project-End Review Meeting	Project Manager (PM)	Once

The following project reports will be delivered:

Report	Responsible	Frequency
Project Status Report	Project Manager (PM)	With Status meeting
Project Progress Report	Project Manager (PM)	With Project Review Meeting
Quality Review Report	Project Manager (PM)	Quarterly
Outsourcing (Contractor) Status Report	Contractor	Monthly
Project-End Report	Project Manager (PM)	With Project-End Review

#### 4.8. Deliverables Acceptance Management

The quality management process comprises the activities related to deliverables acceptance, in order to increase the ability to meet the project' acceptance criteria. This process consists of three steps:

- **Define Acceptance Criteria:** Define the acceptance criteria for each one of the project deliverables. This information is derived from project scope, approach, requestor needs, deliverables, expected benefits and requirements (as defined in the *Business Case*, *Project Charter*, *Project Handbook*, *Project Work Plan*, Requirements documentation and other relevant documents).
- **Perform Acceptance Activities:** Verify if the deliverables comply with the acceptance criteria. The deliverables acceptance activities are detailed and scheduled in the *Project Work Plan*.
- **Perform Deliverables Acceptance (provisional/final):** Obtain formal approval from the Project Owner (PO) for each project deliverable. The provisional/final acceptance should be documented in the Deliverables Acceptance Note. Project deliverables are accepted if the acceptance activities (as described in this plan) are successfully performed and within the pre-specified metrics, tolerances and timeframe. Project deliverables may be provisionally accepted by an expert/user in the concerned acceptance domain, even with a limited set of non-critical issues, provided that these are documented, agreed by the relevant stakeholders, and that there is a plan for addressing them. The rejection of deliverables will follow the project issue management process. After the resolution of the issues, deliverables are re-tested and submitted again for approval.

#### 4.9. Transition Management

The transition management process comprises the activities related to ensure a smooth transition from the "project mode" to the "operations mode". This process consists of the following steps:

- **Identify Transition Goals:** Identify the goals to reach at the end of the transition. Define what must be achieved in order to consider the transition successful. Document any prerequisites that must be fulfilled before the transition can start.
- **Identify Transition Activities:** Define and estimate all transition activities that must be accomplished before, during and after the transition in order to reach the transition goals. Determine the responsible for each activity. Integrate these activities in the overall *Project Work Plan* and manage them as being part of normal project activities. Don't forget

coordination, communication or other more specific transition activities, such as: backups, data conversion, training, developing a roll-back plan, etc.

- **Develop Transition Schedule:** Determine the transition timeline and milestones. Estimate the length of the transition period and the extent of overlap with other project activities. Develop a high-level schedule for all transition activities.

#### 4.10. Business Implementation Management

The business implementation management process comprises the activities related to prepare and manage the changes to the organisation that will occur as a result of the project. This process consists of the following steps:

- **Identify Impact on Processes:** Assess how the project will affect already existing business processes in the performing organisation. Define the new business processes. Strive to disrupt normal business operations as little as possible during project implementation.
- **Identify Impact on People:** Assess how the project will impact the people using the project's outputs. Consider resistance-to-change, communication, functional support, training, etc.
- **Identify Cultural Impact:** Assess how the project will have an impact on the organisational culture. Consider individual or group behaviour, organisational practices or shared values.
- **Define Implementation Strategy:** Define the communication strategy, promotional and other change activities that fall within the project's responsibilities and that will promote a smooth implementation of the project's outputs into the organisation.
- **Define Change Activities:** Define necessary change activities that support the implementation strategy. Consider project activities, change activities for the organisation and post-project change activities.
- **Benefits Tracking:** Identify, describe and recommend activities and metrics for measuring the benefits realisation of the project in the future.

#### 4.11. Resource Management

In particular for human resources, this section should describe how external resources can be contracted (allowed framework contracts, etc.), measured and released. For internal resources, any temporary authority delegation, re-organisation in the hierarchy, need to be clarified in order to avoid authority conflicts. If additional training is needed the following elements from the Resource Plan can be added.

##### Training Needs

The purpose of this section is to document and track the training required for the project, capture project training records and document any waivers for required project training. This summary of project-specific training will also be used to bring new people on board to the project.

Note that the training needs do not refer to any user/stakeholder training on the final deliverables, but only cover any training that members of the Project Team will need to be more effective in their project work. For example, training on the PM<sup>2</sup> Methodology may be deemed as necessary for the Project Manager (PM) and Business Manager (BM), or technical trainings for any technical Project Core Team (PCT) Members.

Training on project-specific procedures/methods/tools will be provided to the project team and any other groups that the project interfaces with, as required. This training will be provided by or acquired by the Project Manager (PM).

Project-specific training include, but are not limited to:

- Project's Issues Management procedure
- Technical aspects of the project

- Configuration Management System and associated procedures being used by the project.

Resource ID	Resource	Training / Skill	Current skill level	Desired skill level	Method of Delivery	Delivered by	Target Delivery Date
H.5	Programmer	Java	Intermediate	Advanced	Coaching	<Insert First Name Last Name>	22/03/2025
H.6	Programmer	Rational Tools	Beginner	Advanced	Internal course	<Insert First Name Last Name>	12/03/2025
H.7	Tester	Mercury tools	Beginner	Intermediate	External Course 3-days	Training centre <Insert Name>	18/03/2025

**Resource ID** – unique identifier of the team member to be trained

**Resource** – name of team member

**Training/skill** – this is a specific item which requires training

**Current skill level** – identifies the skill level that the team member actually has in this item

**Desired skill level** – identifies the skill level that the team member must acquire in order to deliver the requested project results

**Method of Delivery** – identifies the method of delivery (i.e., self-study, project kick-off meeting, scheduled training session, formal classes, mentoring, coaching, etc.)

**Delivered by** – identifies who will deliver the training when the method of delivery is by a person or a group (i.e., Project Manager, Learning Services, experienced team member, etc.)

**Target Delivery Date** – this is the planned date for training on this item to be completed.

## 5. Project Progress Measurement

### 5.1. Project Progress Measuring Approach

It is useful to also define in this section what information will be tracked (e.g. Effort spent, money spent, milestone met, etc.) and how often.

### 5.2. Project Reports

#### 5.2.1. Status and Progress Reports

Other Reports

### 5.3. Project Checklists

Following checklists will be used in order to monitor and control the project:

- Phase-exit Review Checklist
- Quality Review Checklist
- Deliverables Acceptance Checklist
- Transition Checklist
- Business Implementation Checklist
- Stakeholder Checklist

## 6. Project Roles & Responsibilities

### 6.1. Consolidated Responsibilities Assignment Matrix (RAM/RASCI) and Description of Project Roles and Responsibilities

Initiating	AGB	PSC	PO	BM	UR	SP	PM	PCT
Project Initiation Request	I	n.a.	A/S	R	S/C	I	n.a.	n.a.
Business Case	I	C	A	R	C	S	S	n.a.
Project Charter	I	A	C	S	C	S	R	C
Planning	AGB	PSC	PO	BM	UR	SP	PM	PCT
Planning Kick-off Meeting	I	A	C	S	C	C	R	C
Project Handbook	I	I	A	S	C	I	R	C
Project Stakeholder Matrix	I	I	A	S	C	I	R	C
Project Work Plan	I	A	C	S/C	C	C	R	S/C
Outsourcing Plan	A	C	C	C	I	S	R	I
Deliverables Acceptance Plan	I	A	C	S	I	C	R	C
Transition Plan	I	A	C	C	C	C	R	C
Business Implementation Plan	I	I	A	R	C	I	S	I
Management Plans								
Requirements Management Plan	I	I	A	C	C	I	R	S
Project Change Management Plan	I	I	A	C	I	I	R	I
Risk Management Plan	I	C	A	C	I	I	R	I
Issue Management Plan	I	I	A	C	C	I	R	C
Quality Management Plan	I	A	C	C	C	C	R	C
Communications Management Plan	I	I	A	S	C	I	R	C
Executing	AGB	PSC	PO	BM	UR	SP	PM	PCT
Executing Kick-off Meeting	I	A	C	S/C	C	C	R	C
Project Coordination	I	I	A	S	I	I	R	I
Quality Assurance	I	I	I	S	C	I	A	R
Project Reporting	I	I	A	S/C	I/C	I/C	R	C
Information Distribution	I	I	A	C	I	I	R	C
Monitor & Control	AGB	PSC	PO	BM	UR	SP	PM	PCT
Monitor Project Performance	I	I	A	C	C	I	R	C
Control Schedule	I	I	A	C	C	I	R	C
Control Cost	I	I	A	C	C	I	R	C
Manage Stakeholders	I	I	A	S/C	I	C	R	I
Manage Requirements	I	I	A	C	C	I	R	S
Manage Project Changes	I	C	A	S	I	I	R	C
Manage Risks	I	C	A	S/C	C	I	R	C
Manage Issues & Decisions	I	I	A	S	C	I	R	C
Manage Quality	I	I	I	S/C	C	A	R	C
Manage Deliverables Acceptance	I	I	A	S	C	C	R	C
Manage Business Implementation	I	I	A	R	C	I	S	I
Manage Transition	I	A	C	C	C	C	R	C
Manage Outsourcing	A	C	C	C	I	S	R	I
Closing	AGB	PSC	PO	BM	UR	SP	PM	PCT
Project-End Review Meeting	I	A	C	S	C	C	R	C
Project-End Report	I	A	C	S	C	C	R	C
Administrative Closure	I	C	A	C	I	C	R	I

In the following section, the roles of major players in a project are described alongside with the responsibilities, expectations, rights and duties of each participant in the project.

Bear in mind that a role that a person performs in a project may be independent of his function in the personnel in an organisation. Nevertheless, certain roles necessitate a certain level of authority in the organisation as well as some competences that may appear at the function specification for a person. In such cases the descriptions of a role also mention the function that this person occupies in the organisation.>

### 6.2.1. Project Stakeholders

Description
Project stakeholders are people (or groups) who can affect or can be affected by both the activities performed during the life of a project, or/and by the project's output(s) and outcome(s). Stakeholders can be directly involved in a project's work, or can be members of other internal organisations, or even be external to the performing organisation (e.g. suppliers, users, EU citizens, contractors, NGO's, industry partners, member states, etc.).
Responsibilities
<ul style="list-style-type: none"> <li>Other Departments within the Organisation that have shared projects with this Department should join the working group and give feedback on the tailoring of the PM<sup>2</sup> methodology, as well as contribute to the definition of the transition roadmap and procedures for the on-going projects.</li> <li>Contractors need to agree on a set of artefacts and processes that they need to follow for the on-going and new projects within the Department.</li> <li>The External Entities should understand the changes performed on the reporting process and artefacts within the Department and clarify any doubt if needed.</li> <li>The Portfolio Office needs to revise the following artefacts templates: Business Case, Project Charter, Project Progress Report and Project-End Report. Based on the review, the Project Management Board should approve these templates.</li> <li>The Project Management Office should revise the PM<sup>2</sup> methodology and give any suggestion for improving the monitor and control process, if adequate.</li> <li>The Procurement should validate if the PM<sup>2</sup> processes and procedures are aligned with the Procurement procedures.</li> <li>The Internal Audit Department will validate if the audit findings were covered by this project.</li> </ul>

### 6.2.2. Project Steering Committee (PSC)

Description
<p>The permanent members of the committee are:</p> <ul style="list-style-type: none"> <li>Project Owner (PO) who chairs the committee, is the key-decision maker and accountable for the success of the project.</li> <li>Business Manager (BM) who is a delegate of the Project Owner (PO) and collaborates closely with the Project manager (PM).</li> <li>Solution Provider (SP) who assumes the overall accountability for the project deliverables.</li> <li>Project Manager (PM) who is responsible for the entire projects and its deliverables.</li> </ul> <p>The optional members of the committee are:</p> <ul style="list-style-type: none"> <li>User Representatives (UR) who represents the interests of the users to the project.</li> <li>Project Support Office (PSO) that administers PSC meetings and project documentation.</li> <li>Project Quality Assurance (PQA) that is responsible for quality assurance and auditing.</li> </ul>

<ul style="list-style-type: none"> <li>• Architecture Office (AO) that plays an advisory role on architectural aspects of information systems.</li> <li>• Contractor's Project Manager (CPM) responsible for the outsourced parts of the project.</li> <li>• Data Protection Coordinator (DPC) to consult and advise on data protection aspects.</li> <li>• Local Information Security Officer (LISO) to consult and advise on security aspects.</li> <li>• Document Management Officer (DMO) to assure a coherent implementation of the document management roles.</li> </ul>
<b>Responsibilities</b>
<ul style="list-style-type: none"> <li>• Champions the project and raises awareness at senior level.</li> <li>• Guides and promotes the successful execution of the project at a strategic level, keeping the project focused towards its scope.</li> <li>• Ensures adherence to organisation policies and directions.</li> <li>• Provides high level monitoring and control of the project.</li> <li>• At the end of the Initiating phase, authorises the project to continue, based on the project's <i>Business Case</i> and <i>Project Charter</i>, unless this is performed by the Appropriate Governance Body (AGB).</li> <li>• At the end of the Planning Phase, authorises the project to continue to the Executing phase, based on the <i>Project Handbook</i> and <i>Project Work Plan</i>.</li> <li>• Authorises plan deviations, scope changes with high project impact and decides on recommendations.</li> <li>• Arbitrates on conflicts and negotiates solutions to escalated issues.</li> <li>• Drives and manages change in the organisation caused by the project.</li> <li>• Approves and signs-off the management artefacts regarding quality, delivery and closing (<i>Business Case</i>, <i>Project Charter</i>, <i>Project Work Plan</i>, etc.).</li> </ul>

#### 6.2.2.1. Project Owner (PO)

<b>Description</b>
Is the key project decision maker and accountable for project success.
<b>Responsibilities</b>
<ul style="list-style-type: none"> <li>• Acts as the project champion promoting the success of the project.</li> <li>• Chairs the Project Steering Committee (PSC).</li> <li>• Provides leadership and strategic direction to the Business Manager (BM) and Project Manager (PM).</li> <li>• Sets the business objective and defines the <i>Business Case</i> for the project.</li> <li>• Owns the project risks and assures proper project outcomes are in-line with business objectives and priorities.</li> <li>• Mobilises the necessary resources for the project according to the budget.</li> <li>• Monitors project progress regularly.</li> <li>• Coordinates resolution of issues and conflicts.</li> <li>• Ensures that the project outcome meets the business expectations.</li> <li>• Drives organisation change and monitors proper evolution and change implementation.</li> <li>• Approves and signs-off all key management milestone artefacts (<i>Project Handbook</i>, <i>Project Management Plans</i>, <i>Business Implementation Plan</i>, etc.).</li> </ul>

#### 6.2.2.2. Solution Provider (SP)

Description
Assumes overall accountability for the project deliverables.
Responsibilities
<ul style="list-style-type: none"> <li>Represents the interests of those designing, delivering, procuring, and implementing the project's deliverables.</li> <li>May help the Project Owner (PO) to define the <i>Business Case</i> and scope, deliverables, milestones and budget required for the project.</li> <li>Agrees on objectives for the supplier activities and approves the contractor's deliverables for the project (if applicable).</li> <li>Assumes the overall accountability for project deliverables and services requested by the Project Owner (PO).</li> <li>Mobilises the required resources from supplier side and appoints the Project Manager (PM)</li> </ul>

#### 6.2.2.3. Business Manager (BM)

Description
Represents the Project Owner (PO) on a daily basis within the project and collaborates closely with the Project Manager (PM).
Responsibilities
<ul style="list-style-type: none"> <li>Assists the Project Owner (PO) on the specification of the project and the main business objectives.</li> <li>Establishes and guarantees an efficient collaboration and communication channel with the Project Manager (PM).</li> <li>Coordinates the Business Implementation Group (BIG) and acts as a liaison between the User Representatives (UR) and the provider organisation.</li> <li>Is responsible for the <i>Project Initiation Request</i>, <i>Business Case</i> and <i>Business Implementation Plan</i>.</li> <li>Ensures that the products delivered by the project fulfil the user's need</li> <li>Manages the business side activities of the project and assures that the required business resources are made available.</li> <li>Devises the best track for business change or reengineering actions, when needed.</li> <li>Ensures that the business organisation is ready to accommodate the project's deliverables when made available by the provider organisation.</li> <li>Leads the implementation of the business changes within the users organisation.</li> <li>Coordinates the schedule and delivery of user training (and production of necessary user support material).</li> </ul>

#### 6.2.2.4. Project Manager (PM)

Description
Manages the project on a daily basis and is responsible for the qualitative product delivery within the imposed constraints.
Responsibilities
<ul style="list-style-type: none"> <li>Proposes and executes the project plans as approved by the Project Steering Committee (PSC).</li> <li>Daily manages and coordinates the Project Core Team (PCT) activities, making optimal use of the allocated resources.</li> <li>Ensures that project scope is realised within the quality, time, and cost constraints, taking preventive or corrective measures where necessary.</li> <li>Manages stakeholder's expectations.</li> </ul>

- Is responsible to create all the management artefacts (except *Project Initiation Request*, *Business Case* and *Business Implementation Plan*) and proposes them for approval to the Project Owner (PO) or the Project Steering Committee (PSC).
- Ensures a controlled evolution of products under version control, by implementing the Project Change Management Plan.
- Compares project actuals and expenditures to what was planned and reports project progress accordingly to the Project Steering Committee (PSC).
- Performs risk management for project related risks.
- Escalates unresolvable project issues to the Project Steering Committee (PSC)
- Liaises between the Directing and Performing Layers of the project.

### 6.2.3. Business Implementation Group (BIG)

Description
Consists of representatives from the business and user groups. The Business Implementation Group (BIG) is responsible for implementing the business changes that need to be in place in order for the organisation to be able to effectively integrate the project deliverables into everyday work.
Responsibilities
<ul style="list-style-type: none"> <li>• Under the coordination of the Business Manager (BM), the Business Implementation Group (BIG) plans and implements the activities needed to achieve the desired business changes as described in the <i>Business Case</i> and the <i>Business Implementation Plan</i>.</li> <li>• Analyses the impact of the project implementation to the ongoing operations and existing business processes, the people and the culture of the organisation.</li> <li>• Participates in the design or updating of any affected business processes.</li> <li>• Prepares the affected business area for the upcoming change</li> <li>• Advises the Business Manager (BM) concerning the readiness of the organisation to change</li> <li>• Embeds the project deliverables into the business operations and implements organisational change activities that fall under the scope of the project.</li> </ul>

### 6.2.4. User Representatives (URs)

Description
Represent the interests of the end-users in the project. User Representatives (URs) are part of the Business Implementation Group (BIG). Involving the User Representatives (URs) throughout the project is important, as they gain visibility of project activities, a sense of ownership and motivation, which ensures that the deliverables are fit for business purpose.
Responsibilities
<ul style="list-style-type: none"> <li>• Helps to define business needs and requirements.</li> <li>• Ensures that the project specifications and deliverables meet the needs of all users.</li> <li>• Approves on behalf of the users the project specification and acceptance criteria.</li> <li>• Communicates and prioritises user opinions in Project Steering Committee (PSC) decisions on whether to implement recommendations on proposed changes.</li> <li>• Participates in demonstrations and pilot phases as needed.</li> <li>• Performs the deliverable acceptance tests.</li> <li>• Signs off documents related to the users (documentation, requirements, etc.).</li> <li>• Guarantees the stability of the business during the transition towards the new operational state.</li> </ul>

### 6.2.5. Project Core Team (PCT)

Description
Consists of the specialist roles responsible for the creation of the project deliverables.
Responsibilities
<p>Under the coordination of the Project Manager (PM), the Project Core Team (PCT):</p> <ul style="list-style-type: none"> <li>• Contributes in the elaboration of the project scope and the planning of the project activities.</li> <li>• Performs the project activities according to the <i>Project Work Plan</i> and schedule.</li> <li>• Produces project deliverables.</li> </ul>

- Provides information to the Project Manager (PM) regarding the progress of activities.
- Participates in project meetings as needed and contributes to the resolution of issues.
- Participates in the Project-End Meeting to derive and document useful lessons learned for the organisation.

#### 6.2.5.1. Contractor's Project Manager (CPM)

Description
Leads the contractor's deliverables for the project.
Responsibilities
<ul style="list-style-type: none"> <li>• Collaborates closely with the Project Manager (PM).</li> <li>• Plan, controls and reports on the production of deliverables.</li> <li>• Ensures that all work is performed on time and to the agreed standards and quality.</li> <li>• Guarantees the successful completion and delivery of the subcontracted activities.</li> </ul>

#### 6.2.5.2. Assistant Project Manager (APM)

Description
In large projects the Project Manager (PM) might find it useful to delegate a part of the project management tasks to an assistant. This Assistant Project Manager (APM) works closely together with the Project Manager (PM) in realizing the project scope and acts as a his backup. Although the Project Manager (PM) can delegate certain tasks to the Assistant project Manager (APM), the PM remains responsible for the correct execution of these tasks.
Responsibilities
<ul style="list-style-type: none"> <li>• Reports to and takes directions from the Project Manager (PM).</li> <li>• Assists in the development and execution of project and team plans (or parts of it).</li> <li>• Communicates plans, decisions, and instructions to the Project Core Team (PCT) or external contractors.</li> <li>• Participates in coordinating the Project Core team (PCT) and Project Support Team (PST).</li> <li>• Provides guidance to project participants in support of work execution.</li> <li>• Assists with the organisation of project meetings and creating the minutes.</li> <li>• Gathers status information, actuals and forecasts of all work packages and advises the Project Manager (PM) of any discrepancies.</li> <li>• Proactively detects quality or scheduling issues and proposes preventive actions.</li> <li>• Prepares or contributes to project status reports in timely manner.</li> <li>• Supports the risk and change management process, updates the Risk and Change Logs.</li> <li>• Coordinates deliverable acceptance with internal and external users and stakeholders.</li> <li>• Establishes the routine project communications to inform project stakeholders.</li> </ul>

<Add any domain specific roles (or delete this section) >

Description
<Insert role description>
Responsibilities
<ul style="list-style-type: none"> <li>• &lt;Insert role responsibilities description&gt;</li> </ul>

#### 6.2.5.3. Project Support Team (PST)

Description
Consists of the roles responsible for providing support to the project. The composition and structure of the Project Support Team (PST) depends on the size of the project and is defined by the Project Manager (PM). The Project Support Team (PST) role may be assumed by team members, a specific team or be provided as horizontal services by the organisation.

Responsibilities
<ul style="list-style-type: none"> <li>• Provides administrative support to the project.</li> <li>• Defines requirements for reporting and communications.</li> <li>• Administers the Project Steering Committee (PSC) meetings and produces consolidated reports.</li> <li>• Supports the Project Manager (PM) in planning, monitoring and controlling the project.</li> <li>• Advises on project management tools and administrative services.</li> <li>• Administers the project documentation (versioning, archiving, etc.).</li> </ul>

#### 6.2.6. Project Support Office (PSO)

Description
Provides support to the Project Manager (PM) and the Project Core Team.
Responsibilities
<ul style="list-style-type: none"> <li>• Advises on project management tools, guidance and administrative services.</li> <li>• Administers Project Steering Committee (PSC) meetings.</li> <li>• Produces consolidated reporting to the Project Steering Committee (PSC).</li> <li>• Manages internal communication.</li> <li>• Establishes standards, tools, procedures and methods for use on the project.</li> <li>• Administers Project Management aspects such as document change control, baseline of plans, etc.</li> <li>• Can play the role of the custodian and guardian of all master copies of the project's products.</li> </ul>

##### 6.2.6.1. Project Quality Assurance (PQA)

Description
Assures the quality of the project and its deliverables, independently of the Project Manager (PM).
Responsibilities
<ul style="list-style-type: none"> <li>• Ensures adherence to organisational policies, directions and predefined project management processes.</li> <li>• Establishes quality assurance standards.</li> <li>• Supports the Project Manager (PM) in planning, monitoring and controlling the quality of the project.</li> <li>• Reviews project management processes and artefacts (e.g. <i>Project Charter</i> and Project Management Plans) as part of quality assurance.</li> <li>• Identifies non-conformities or opportunities for improvement and recommends actions to the Project Steering Committee (PSC) for decision.</li> <li>• Reports to the Project Steering Committee (PSC).</li> </ul>

**Appendix 1: References and Related Documents**

ID	Reference or Related Document	Source or Link/Location
1	03.Project_Charter.Roll-out of PM <sup>2</sup> .22-02-2025.v.1.1.docx>	<Insert Project Repository Location>
2	Project folder	<Insert Project Repository Location>

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# **Project Work Plan**

## **Improvement of PM Practice**

Date: 23/06/2025  
Doc. Version: 1  
Template version: 3.1



*This template is based on PM² V3.1*

**Document Control Information**

Settings	Value
Document Title:	Project Work Plan
Project Title:	Improvement of PM Practice
Document Author:	<Insert First Name Last Name>
Project Owner:	<Insert First Name Last Name>
Project Manager:	<Insert First Name Last Name>
Doc. Version:	1
Sensitivity:	Public, Basic, High
Date:	23/06/2025

**Document Approver(s) and Reviewer(s):**

NOTE: All Approvers are required. Records of each approver must be maintained. All Reviewers in the list are considered required unless explicitly listed as Optional.

Name	Role	Action	Date
<Insert First Name Last Name>	Project Owner	Approved	15/03/2025

**Document history:**

The Document Author is authorized to make the following types of changes to the document without requiring that the document be re-approved:

- Editorial, formatting, and spelling
- Clarification

To request a change to this document, contact the Document Author or Owner.

Changes to this document are summarized in the following table in reverse chronological order (latest version first).

Revision	Date	Created by	Short Description of Changes
1.1	15/03/2025	<Insert First Name Last Name>	Minor update of Section 2

**Configuration Management: Document Location**

The latest version of this controlled document is stored in <Insert Departmental Document Repository Location>.

## 1. Introduction

The Project Work Plan documents all project activities needed to achieve the goals of the improvement of PM practice within the Department, along with their detailed effort/cost estimates, their schedule and resulting project duration and resource requirements. The Project Work Plan will be used as the basis to monitor the progress and control the project.

The Project Work Plan is comprised of three parts:

1. **Work Breakdown:** A hierarchical description of all the work that must be done to meet the goals of the project, and contributes towards the better understanding of the project scope and establishes a common basis for all stakeholders.
2. **Effort & Cost Estimates:** Estimates of effort/cost for each project task depending upon resource availability and capability.
3. **Project Schedule:** The planned schedule for project tasks which will be used to implement the project and monitor its progress.

The Project Work Plan includes the estimated effort/cost and schedule for all project activities, including the ones identified and described in other project plans (i.e. Transition Plan and Business Implementation Plan), as well as project management activities related to Risk Management, Quality Management (e.g. scheduled project evaluation or audits) and Deliverables Acceptance.

Note that this document will always contain the latest baselined plan. References to previous versions of this document (for the purposes of tracing changes) along with the relevant status reports are found in the Appendix 1: REFERENCES AND RELATED DOCUMENTS.

## 2. Work Breakdown

This section presents the breakdown of the project into smaller and more manageable components, such as deliverables, work packages, activities, and tasks. Each lower level of the representation offers a finer level of detail of the deliverables and work that all together define the project output(s) and the work involved to produce them.

Each component of the work breakdown has a unique type (e.g. Deliverable, Activity, Task, Work Package), a name and an ID. The ID convention followed is described below:

The Project itself is the first level of the breakdown and its component ID is 1.0.

The second level (be it deliverables or groupings of work) is codified with an increase of the second digit and is therefore represented with 1.1 for the first component, 1.2 for the second etc.

Similarly, the third level is codified with an increase in the third digit (i.e. 1.1.1, 1.1.2, 1.2.1, 1.2.2. etc.).

### Work Breakdown Structure

The chosen approach for the project breakdown is work-based breakdown, as described in the 12.1 Project Work Plan – Scheduling and Resource Usage. The location of this artefact is referred in the Appendix 1.

The main work components are described below:

Work Breakdown Component Description
<b>1.1 Project Management</b> This component refers to the activities needed to manage the project, i.e. documentation and maintenance of the project management artefacts, planning of project management meetings and monitoring and control activities related to change, quality, deliverables acceptance, risk and issue management.

**1.2 Tailoring of PM<sup>2</sup> to Department' needs**

This component refers to the tailoring of the PM<sup>2</sup> methodology to the Department' needs. It will include the definition of the governance model, the roles and responsibilities within the Department, the project management processes and the review of the interfaces with other organisational processes.

Project management artefacts (32 templates) will be also tailored, particularly in the case of the reporting (4 templates) and outsourcing artefacts (1 template). The template for the outsourcing report will be developed from scratch.

A kick-start guide (around 5 pages) will be developed with the steps to be followed when initiating a project and with the links to useful information.

These artefacts will be reviewed by the Working Group and by the Portfolio Office and approved by the Project Management Board (PMB).

**1.3 Department's PM<sup>2</sup> Collaboration tool**

The Department' PM<sup>2</sup> Collaboration tool will be built with the image of Organisation and will include the following menus:

- Overview of PM<sup>2</sup>: Summary of the PM<sup>2</sup> methodology and available resources from PMO.
- Departmental PM<sup>2</sup> Methodology: Overview of the PM<sup>2</sup> methodology tailored to the Department' needs, the roadmap for transition, the governance model and the roles & responsibilities.
- Guidelines: Guidelines to help project participants to use the tailored PM<sup>2</sup> methodology. These guidelines will be structured by PM<sup>2</sup> phases.
- Templates: Repository of the available templates for project management.
- Dashboard: Selection of a set of KPIs and metrics to evaluate projects' performance. All Department' projects will be listed in the Dashboard and the information will be updated monthly based on the Progress Reports.

The communication of the Collaboration tool will be performed on different communication media, e.g. organisational internal website, emails, newsletter, leaflets and posters.

**1.4 Central Project Repository**

The projects repository will be built on Collaboration platform and will take into account the specifications from the Document Management Officer and the defined configuration management procedure. This repository will include a Lessons Learned database organised by categories. The look & feel will follow the one of the Collaboration tool.

The communication of the Central Project Repository will be performed on different communication media, e.g. organisational internal website, emails, newsletter, leaflets and posters.

**1.5 Set-up of the Project Support Team (PST)**

The Project Support Team will be composed by one member of the PCT and it will continue operational after the project ends. This delivery of the project will include the definition of the governance model, the roles and responsibilities and the processes that will be used by the team. Moreover, it will define and implement the administrative procedures related to project management and perform project monitoring and control.

The main roles for this team are:

- Advice Department staff on PM<sup>2</sup> methodology and provide guidance on administrative services related to project management.
- Monitoring projects performance and produce consolidated reporting to the Heads of Sector and to the Head of Department.
- Review the reporting to external entities, in order to guarantee the quality of the deliverables.
- Manage the content of the Collaboration tool, including updating the artefacts templates for continuous improvement.
- Guarantee the correct application of the configuration management process in the Project Repository.
- Be the first level support for PM<sup>2</sup> methodology and centralise the contact to organisational PMO (second level support).
- Perform reviews of projects within the Department, in terms of verifying the compliance with the project management methodology and corporate processes.

### 1.6 Transition Management

Transition management will include the following deliverables:

- **Transition Roadmap:**

This roadmap is the "big picture" of how and when on-going projects will change the project management methodology from "As is" to "To be" – PM<sup>2</sup> methodology. Moreover, a new project management governance will be in place, so the transition roadmap also identifies from when the new governance will be operational, e.g. the Project Support Team.

- **Transition Procedures for users:** Elaboration of detailed procedures to help the Project Managers to handle transition.

- **Pilot Project:**

When identifying the "as is" processes, the pilot project will be selected from the portfolio of projects. The characteristics that the selected project needs to fulfil are:

- Being a project managed within the Department.
- The project should begin in March 2025.
- The duration of the project should be around 3 months.
- The Project Manager is motivated and willing to drive the pilot.

The Project Core Team (PCT) will follow the pilot on a weekly basis, attending the Pilot Project Follow-up Meetings. The agenda of these meetings will include the discussion of the benefits and constraints found when applying the methodology and the opportunities for improvement.

- **Workshop:**

The workshop will invite all Project Managers and Business Managers within the Department and will consist of the discussion of the Department' projects status related to the adoption of the methodology and the main constraints faced during the transition process. The PM<sup>2</sup> Team will be coaching the workshop and will help the Project Managers and Business Managers to find solutions for their constraints/issues.

### 1.7 Business Implementation Management

Business implementation activities will include the following deliverables:

- **Production of the communication material:**

The communications items for this project are defined in the Communications Management Plan. The communication/promotional material for this project will be leaflets, posters and a quick-start guide. The design of these materials will be performed by the Organisation' Communication Department. The content for each communication will be transmitted in meetings with Organisation' Communication Department. The promotional items and the communication to external entities will be sent to the identified stakeholders as described in the Communications Management Plan.

- **Awareness Sessions:**

This component includes two awareness sessions, one in the beginning of the project and another when the methodology is already available for use. The first awareness session aims to inform the audience of the project objectives, scope, milestones and the impact on the Department' way of working.

The second awareness session aims to communicate the available deliverables of the project and the status of the on-going activities.

- **Training:**

The training courses are coordinated by the Business Manager and delivered by HR. Special sessions will be available on internal HR training tool for the Department' staff and they are mandatory. The scheduling of the training sessions will be performed in the beginning of the project to guarantee staff availability. The training documentation will be delivered by HR.

## 3. Effort & Cost Estimates

This section documents the reasoning and final effort and cost estimates of the project activities. The work breakdown of Section 2 is the input for the estimation.

This project will be mainly executed by 2 Staff (0.5 FTE) and 2 internal contractors in the first year and maintained by 1 internal contractor and 0.2 FTEs of staff, from the Department.

Support/coaching will be performed by PMO.

The project will have an estimated total cost of 38,801€ + 0.7 FTE for 2025 and a TCO of 105 K€ + 1.5 FTE.

Work Breakdown description		Effort (FTE)	Total Cost (Euros)
1.1	Project Management	0.34	2,255 €
1.2	Tailoring of PM <sup>2</sup> to Departmental needs	0.03	6,425 €
1.3	Departmental PM <sup>2</sup> Collaboration tool	0.00	3,075 €
1.4	Central Project Repository	0.00	2,138 €
1.5	Set-up of the Project Support Team (PST)	0.00	2,494 €
1.6	Transition Management	0.15	6,395 €
1.7	Business Implementation Management	0.1	16,019 €
Total		<b>0.62</b>	<b>38,801 €</b>

#### 4. Project Schedule

The main project milestones are as following:

ID	Milestone Description	Target Delivery Date
	<b>Initiating Phase</b>	<b>22 February 2025</b>
1	Definition of the context, impact and outcomes of the envisaged solution	18 January 2025
2	Business Case approved	01 February 2025
3	Project Charter approved	22 February 2025
	<b>Planning Phase</b>	<b>15 March 2025</b>
4	Project planning artefacts approved	15 March 2025
	<b>Executing Phase</b>	<b>5 July 2025</b>
5	Identification of the gap between "As is" and "To be" and creation of a working group for interaction with other Departments	15 March 2025
6	Executing Kick-off Awareness Session	15 March 2025
7	Communication material delivered	15 April 2025
8	Approval of the tailored PM <sup>2</sup> Methodology by the Organisational Project Management Board	16 April 2025
9	Approval of the Transition Roadmap and Procedures	16 April 2025
10	Creation of the Departmental PM <sup>2</sup> Collaboration tool and project repository	23 April 2025
11	Project Support Team officially operational	29 April 2025
12	Training completed	07 May 2025
13	Awareness Sessions completed	10 May 2025

ID	Milestone Description	Target Delivery Date
14	Execution of the pilot completed	26 June 2025
15	Follow-up of running projects transition completed	02 July 2025
16	Workshop performed	05 July 2025
17	Formal deliverables acceptance	05 July 2025
	<b>Closing Phase</b>	<b>12 July 2025</b>
18	Project Final Acceptance	11 July 2025
19	Project closed	12 July 2025

The project scheduling activities are detailed in the 12.1 Project Work Plan - Resource Usage. The location of this artefact is referred in the Appendix 1.

## 5. Related PM<sup>2</sup> Plans

### 5.1. Project Handbook

The Project Handbook establishes the high-level approach for implementing the project goals, which includes required documentation, standards to be considered and the high-level summary of the quality and configuration management approach. The location of this artefact is found in the Appendix 1.

### 5.2. Resource Plan

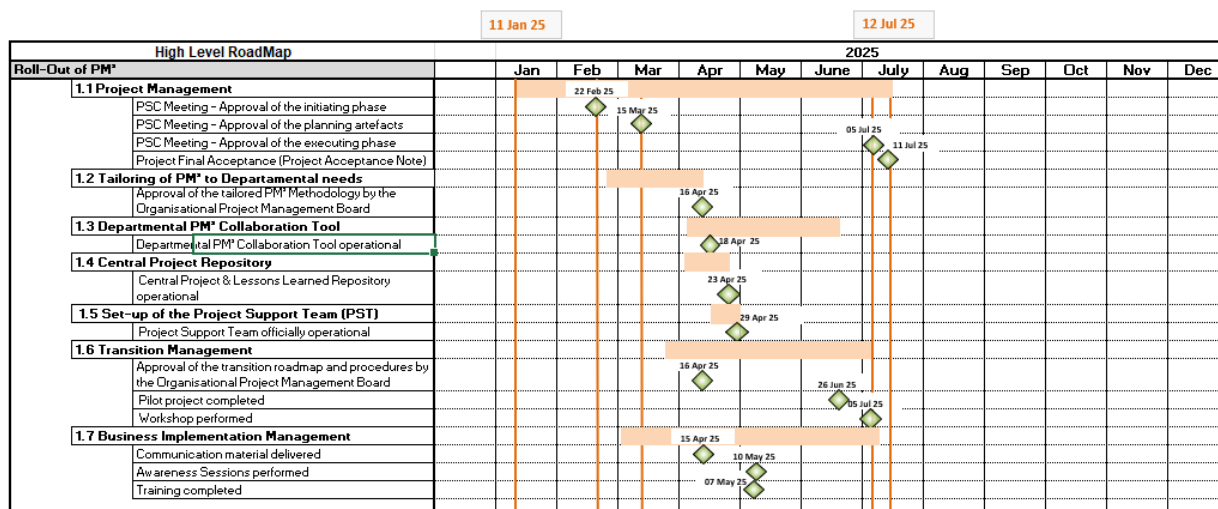
The Resource Plan, as an Annex to the Project Work Plan, captures all types of resources requirements, plan and costs and the skills and training needs to be foreseen for the project. This plan includes the identification of the required profiles for deliverables testing and acceptance, as well as the need of other type of resources such as equipment, tools and licenses. The location of this Annex to the Project Work Plan is found in Appendix 1.

### 5.3. Other Related Plans

1. Communications Management Plan
2. Quality Management Plan
3. Deliverables Acceptance Management Plan
4. Transition Plan
5. Business Implementation Plan

**Appendix 1: References and Related Documents**

ID	Reference or Related Document	Source or Link/Location
1	03.Project_Charter.Roll-out of PM2.22-02-2025.v1.1.docx	<Insert Project Repository Location>
2	04.Project_Handbook.Roll-out of PM2.15-03-2025.v1.1.docx	<Insert Project Repository Location>
3	12.2.Project_Work_Plan-Resource Plan.Roll-out of PM2.15-03-2025.v1.1.xlsx	<Insert Project Repository Location>
4	12.1.Project_Work_Plan- Scheduling and Resource Usage.Roll-out of PM2.15-03-2025.v1.1.xlsx	<Insert Project Repository Location>
5	Project folder	<Insert Project Repository Location>

Scheduling and Resource Usage - RoadMap<sup>1</sup>Scheduling and Resource Usage – Scheduling<sup>2</sup>

Task Name	Work (hours)	Duration	Start	Finish
<b>1. Roll-Out of PM<sup>2</sup></b>	2,041.47	<b>131 days</b>	<b>Fri 11/01/25</b>	<b>Fri 12/07/25</b>
<b>1.1 Project Management</b>	612.97	<b>131 days</b>	<b>Fri 11/01/25</b>	<b>Fri 12/07/25</b>
<b>1.1.1 Initiating Phase</b>	94.00	<b>31 days</b>	<b>Fri 11/01/25</b>	<b>Fri 22/02/25</b>
1.1.1.1 Project Initiation Request	9.00	6 days	Fri 11/01/25	Fri 18/01/25
1.1.1.1.1 Elaboration of the Project Initiation Request (PIR)	6.00	3 days	Fri 11/01/25	Tue 15/01/25
1.1.1.1.2 Discussion on the PIR with the Project Owner and PIR updating	2.00	2 days	Tue 15/01/25	Wed 16/01/25
1.1.1.1.3 PIR approval	1.00	2 days	Thu 17/01/25	Fri 18/01/25
1.1.1.2 Business Case	33.00	10 days	Fri 18/01/25	Thu 31/01/25
1.1.1.2.1 Collection of requirements with the main stakeholders	8.00	4 days	Fri 18/01/25	Wed 23/01/25
1.1.1.2.2 Elaboration of the Business Case (BC)	16.00	3 days	Thu 24/01/25	Mon 28/01/25
1.1.1.2.3 Review of the BC	8.00	2 days	Tue 29/01/25	Wed 30/01/25
1.1.1.2.4 BC approval	1.00	1 day	Thu 31/01/25	Thu 31/01/25
1.1.1.3 Project Charter	52.00	16 days	Fri 01/02/25	Fri 22/02/25
1.1.1.3.1 Detail requirements with the main stakeholders	16.00	6 days	Fri 01/02/25	Fri 08/02/25
1.1.1.3.2 Elaboration of the Project Charter (PC)	24.00	4 days	Mon 11/02/25	Thu 14/02/25

<sup>1</sup> 12.1.Project Work Plan-Scheduling and Resource Usage. Roll-Out of PM2.15-03-2025.v1.1<sup>2</sup> 12.1.Project Work Plan-Scheduling and Resource Usage. Roll-Out of PM2.15-03-2025.v1.1

1.1.1.3.3 Review of the PC	8.00	3 days	Fri 15/02/25	Tue 19/02/25
1.1.1.3.4 PC approval	4.00	3 days	Wed 20/02/25	Fri 22/02/25
<b>PSC Meeting - Approval of the Initiating Phase</b>	<b>0.00</b>	<b>0 days</b>	<b>Fri 22/02/25</b>	<b>Fri 22/02/25</b>
<b>1.1.2 Planning Phase</b>	<b>119.97</b>	<b>16 days</b>	<b>Fri 22/02/25</b>	<b>Fri 15/03/25</b>
1.1.2.1 Planning Kick-off Meeting	8.00	1 day	Fri 22/02/25	Fri 22/02/25
1.1.2.2 Documentation of the Project Management Artefacts	107.97	15 days	Mon 25/02/25	Fri 15/03/25
1.1.2.2.1 Elaboration of the Project Handbook and the Stakeholder Matrix	15.23	2 days	Mon 25/02/25	Tue 26/02/25
1.1.2.2.2 Elaboration of the Project Plans:	62.73	8 days	Mon 25/02/25	Wed 06/03/25
1.1.2.2.2.1 Project Work Plan	17.4	3 days	Mon 25/02/25	Wed 27/02/25
1.1.2.2.2.2 Resource Plan	4	1 day	Tue 26/02/25	Wed 27/02/25
1.1.2.2.2.3 Transition Plan	3	1 day	Thu 28/02/25	Thu 28/02/25
1.1.2.2.2.4 Business Implementation Plan	6.33	1 day	Thu 28/02/25	Thu 28/02/25
1.1.2.2.2.5 Communications Management Plan	9	1 day	Fri 01/03/25	Fri 01/03/25
1.1.2.2.2.6 Project Change Management Plan	3	1 day	Thu 28/02/25	Fri 01/03/25
1.1.2.2.2.7 Risk Management Plan	3	1 day	Mon 04/03/25	Mon 04/03/25
1.1.2.2.2.8 Quality Management Plan	6	1 day	Tue 05/03/25	Tue 05/03/25
1.1.2.2.2.9 Issue Management Plan	3	1 day	Mon 04/03/25	Mon 04/03/25
1.1.2.2.2.10 Deliverables Acceptance Management Plan	8	1 day	Wed 06/03/25	Wed 06/03/25
1.1.2.2.3 Definition/Updating of project logs	6	1 day	Thu 07/03/25	Thu 07/03/25
1.1.2.2.4 Tailoring of project checklists:	18	5 days	Fri 08/03/25	Thu 14/03/25
1.1.2.2.4.1 Phase-exit Review Checklist	6	1 day	Fri 08/03/25	Fri 08/03/25
1.1.2.2.4.2 Quality Review Checklist	6	1 day	Tue 12/03/25	Tue 12/03/25
1.1.2.2.4.3 Transition Checklist	3	1 day	Wed 13/03/25	Thu 14/03/25
1.1.2.2.4.4 Business implementation Checklist	3	1 day	Wed 13/03/25	Thu 14/03/25
1.1.2.2.5 Review of project management artefacts	6	11 days	Fri 01/03/25	Fri 15/03/25
1.1.2.3 Definition of the Project Working Group (objectives, scope and members)	4.00	1 day	Tue 12/03/25	Tue 12/03/25
<b>PSC Meeting - Approval of the planning artefacts</b>	<b>0.00</b>	<b>0 days</b>	<b>Fri 15/03/25</b>	<b>Fri 15/03/25</b>

<b>1.1.3 Executing Phase</b>	88.00	<b>98 days</b>	<b>Tue 26/02/25</b>	<b>Thu 05/07/25</b>
1.1.3.1 Executing Kick-off Meeting	14.00	1 day	Tue 26/02/25	Tue 26/02/25
1.1.3.2 Project Core Team Meeting (weekly)	24.00	90 days	Mon 04/03/25	Fri 05/07/25
1.1.3.3 Project Follow-up Meetings (weekly)	26.00	90 days	Mon 04/03/25	Fri 05/07/25
1.1.3.4 Project Steering Committee Meetings	24.00	94 days	Mon 04/03/25	Thu 05/07/25
<b>PSC Meeting - Executing Phase Approval</b>	<b>0.00</b>	<b>0 days</b>	<b>Fri 05/07/25</b>	<b>Fri 05/07/25</b>
<b>1.1.4 Monitor &amp; Control</b>	186.00	<b>90 days</b>	<b>Mon 04/03/25</b>	<b>Fri 05/07/25</b>
1.1.4.1 Updating Project Work Plan (schedule & resources consumption)	30.00	90 days	Mon 04/03/25	Fri 05/07/25
1.1.4.2 Review of risks, issues and changes and updating of logs	30.00	90 days	Mon 04/03/25	Fri 05/07/25
1.1.4.3 Analysis of performance & elaboration of the weekly Status Report	30.00	90 days	Mon 04/03/25	Fri 05/07/25
1.1.4.4 Elaboration of the monthly Progress Report	16.00	90 days	Mon 04/03/25	Fri 05/07/25
1.1.4.5 Deliverables review	40.00	90 days	Mon 04/03/25	Fri 05/07/25
1.1.4.6 Milestone & phase-exit review (based on checklists)	20.00	90 days	Mon 04/03/25	Fri 05/07/25
1.1.4.7 Elaboration of the Quality Review Report (based on the pilot + configuration reviews + workshop + follow-up of running projects transition)	12.00	3 days	Mon 01/07/25	Wed 03/07/25
1.1.4.8 Review of project achievements & formal deliverables acceptance (PSC)	8.00	1 day	Fri 05/07/25	Fri 05/07/25
<b>1.1.5 Closing Phase</b>	45.00	<b>5 days</b>	<b>Mon 08/07/25</b>	<b>Fri 12/07/25</b>
1.1.5.1 Planning & executing of the Project-End Review Meeting	11.00	2 days	Mon 08/07/25	Tue 09/07/25
1.1.5.2 Consolidation of feedback & lessons learned and documentation of post-project recommendations	10.00	2 days	Tue 09/07/25	Wed 10/07/25
1.1.5.3 Elaboration of the Project-End report	7.00	1 day	Thu 11/07/25	Thu 11/07/25

1.1.5.4 Sending and collecting feedback (satisfaction questionnaire) from stakeholders (External Entities, Contractors, Working Group, Procurement, Portfolio Office and PMO)	10.00	5 days	Mon 01/07/25	Fri 05/07/25
1.1.5.5 Execution of the administrative closure	7.00	1 day	Fri 12/07/25	Fri 12/07/25
<b>Project Final Acceptance (Project Acceptance Note)</b>	<b>0.00</b>	<b>0 days</b>	<b>Thu 11/07/25</b>	<b>Thu 11/07/25</b>
<b>1.1.6 PM<sup>2</sup> Coaching</b>	80.00	98 days	Fri 22/02/25	Tue 09/07/25
<b>1.2 Tailoring of PM<sup>2</sup> to Departmental needs</b>	231.27	<b>34 days</b>	<b>Tue 26/02/25</b>	<b>Fri 12/04/25</b>
<b>1.2.1 Identification of "As Is" processes, procedures, roles and artefacts</b>	24.00	4 days	Tue 26/02/25	Fri 01/03/25
<b>1.2.2 Tailoring of the governance model, processes, artefacts and guidelines</b>	101.27	<b>14 days</b>	<b>Mon 04/03/25</b>	<b>Thu 21/03/25</b>
1.2.2.1 Tailor of the PM <sup>2</sup> Governance Model and roles & responsibilities	10.00	1 day	Mon 04/03/25	Mon 04/03/25
1.2.2.2 Tailor of the PM <sup>2</sup> processes	28.00	2 days	Tue 05/03/25	Wed 06/03/25
1.2.2.3 Updating of processes interfaces with other organisational processes	4.00	1 day	Thu 07/03/25	Thu 07/03/25
1.2.2.4 Tailor of the PM <sup>2</sup> artefacts	32.00	4 days	Fri 08/03/25	Wed 13/03/25
1.2.2.5 Definition of the guidelines summarising the tailored PM <sup>2</sup> methodology	20.00	2 days	Thu 14/03/25	Fri 15/03/25
1.2.2.6 Review of the governance model, processes, artefacts and guidelines	7.27	1 day	Thu 21/03/25	Thu 21/03/25
<b>1.2.3 Reporting artefacts</b>	17.00	<b>9 days</b>	<b>Mon 18/03/25</b>	<b>Thu 28/03/25</b>
1.2.3.1 Tailoring of the PM <sup>2</sup> reporting artefacts	6.00	1 day	Mon 18/03/25	Mon 18/03/25
1.2.3.2 Update of the reporting procedures	3.00	1 day	Tue 19/03/25	Tue 19/03/25
1.2.3.3 Elaboration of the Communication to the External Entities	8.00	2 days	Wed 27/03/25	Thu 28/03/25
<b>1.2.4 Outsourcing artefacts</b>	51.00	<b>14 days</b>	<b>Mon 18/03/25</b>	<b>Thu 04/04/25</b>
1.2.4.1 Meeting with Procurement and identification of mandatory procedures	7.00	1 day	Mon 18/03/25	Mon 18/03/25

1.2.4.2 Tailoring of the PM <sup>2</sup> Outsourcing Plan	7.00	1 day	Tue 19/03/25	Tue 19/03/25
1.2.4.3 Elaboration of the Outsourcing Report	14.00	2 days	Wed 20/03/25	Thu 21/03/25
1.2.4.4 Review of the outsourcing artefacts	7.00	1 day	Thu 21/03/25	Thu 21/03/25
1.2.4.5 Validation of the outsourcing artefacts with the Contractors	8	2 days	Thu 28/03/25	Fri 29/03/25
1.2.4.6 Awareness Sessions with Contractors	8	2 days	Wed 03/04/25	Thu 04/04/25
<b>1.2.5 Review of the PM<sup>2</sup> Methodology by the Working Group</b>	27	<b>2 days</b>	<b>Mon 01/04/25</b>	<b>Tue 02/04/25</b>
1.2.5.1 Execution of the Working Group meetings	20	1 day	Mon 01/04/25	Mon 01/04/25
1.2.5.2 Update of the methodology considering suggestions	7	1 day	Tue 02/04/25	Tue 02/04/25
<b>1.2.6 Review of the BC, PC, Progress Report and Project-end Report by the Portfolio Office</b>	11	<b>6 days</b>	<b>Fri 05/04/25</b>	<b>Fri 12/04/25</b>
1.2.6.1 Request approval of the artefacts to the Portfolio Office	2	1 day	Fri 05/04/25	Fri 05/04/25
1.2.6.2 Execution of the meeting to discuss suggestions	9	1 day	Fri 12/04/25	Fri 12/04/25
<b>Approval of the tailored PM<sup>2</sup> Methodology by the Organisational Project Management Board</b>	<b>0</b>	<b>0 days</b>	<b>Tue 16/04/25</b>	<b>Tue 16/04/25</b>
PMB	0		Tue 16/04/25	Tue 16/04/25
<b>1.3 Departmental PM<sup>2</sup> Collaboration Tool</b>	82	<b>57 days</b>	<b>Fri 05/04/25</b>	<b>Mon 24/06/25</b>
1.3.1 Creation of the Collaboration Tool space	3	1 day	Fri 05/04/25	Fri 05/04/25
1.3.2 Creation of the Collaboration Tool menu	8	2 days	Fri 05/04/25	Mon 08/04/25
1.3.3 Introduction of the content in every menu, sub menus (texts, images, links)	16	4 days	Tue 09/04/25	Fri 12/04/25
1.3.4 Design of the Collaboration Tool look and feel (colours, shapes, banner, homepage)	8	2 days	Mon 15/04/25	Tue 16/04/25
1.3.5 Implementation of the Communications Mgt Plan for the Collaboration Tool - Communication of the URL in strategic places (Newsletter, email signature, promotional materials, etc)	12	4 days	Mon 15/04/25	Thu 18/04/25

1.3.6 Creation of the projects dashboard in the Collaboration Tool	11	2 days	Fri 19/04/25	Mon 22/04/25
1.3.7 Maintenance of the Collaboration Tool by updating regularly the content, adding news, answer to the users questions	24	43 days	Mon 22/04/25	Mon 24/06/25
Departmental PM <sup>2</sup> Collaboration Tool operational	0	0 days	Thu 18/04/25	Thu 18/04/25
1.4 Central Project Repository	61	11 days	Tue 09/04/25	Tue 23/04/25
1.4.1 Creation of the space on Collaboration Platform	2	1 day	Tue 09/04/25	Tue 09/04/25
1.4.2 Interactions with the Document Management Officer (DMO) to align procedures	4	1 day	Tue 09/04/25	Tue 09/04/25
1.4.3 Elaboration of the detailed configuration management procedures for the Departmental Project Repository and Lessons Learned database	12	2 days	Wed 10/04/25	Thu 11/04/25
1.4.4 Implementation of the procedures on the Collaboration Platform structure and rules	6	1 day	Fri 12/04/25	Fri 12/04/25
1.4.5 Design of project repository look and feel	9	2 days	Mon 15/04/25	Tue 16/04/25
1.4.6 Creation of projects Lessons Learned database	12	2 days	Wed 17/04/25	Thu 18/04/25
1.4.7 Elaboration of the guidelines on how to use the project repository	12	2 days	Fri 19/04/25	Mon 22/04/25
1.4.8 Communication of the project repository and the related procedures	4	1 day	Tue 23/04/25	Tue 23/04/25
Central Project & Lessons Learned Repository operational	0	0 days	Tue 23/04/25	Tue 23/04/25
1.5 Set-up of the Project Support Team (PST)	66.5	10 days	Thu 18/04/25	Wed 01/05/25
1.5.1 Definition of the PST governance model and the roles & responsibilities	11	1 day	Tue 23/04/25	Tue 23/04/25
1.5.2 Definition of the PST processes and procedures	12	2 days	Wed 24/04/25	Thu 25/04/25
1.5.3 Definition of the guidance for project administrative procedures & interactions with other processes	11	2 days	Fri 26/04/25	Mon 29/04/25

1.5.4 Detail the PST transition roadmap from project mode to operations mode	15	2 days	Tue 30/04/25	Wed 01/05/25
1.5.5 Definition of KPIs and metrics for project monitoring (to be incorporated in the dashboard) and Excel based tools for producing consolidated reports	17.5	4 days	Thu 18/04/25	Wed 24/04/25
Project Support Team officially operational	0	0 days	Mon 29/04/25	Mon 29/04/25
1.6 Transition Management	420.55	73 days	Wed 27/03/25	Fri 05/07/25
1.6.1 Documentation of the detailed Transition Roadmap	12	2 days	Tue 02/04/25	Wed 03/04/25
1.6.2 Elaboration of the Transition Procedures for users	18	3 days	Thu 04/04/25	Mon 08/04/25
1.6.3 Review of the Transition Roadmap and Procedures by the PSC	14	1 day	Fri 12/04/25	Fri 12/04/25
1.6.4 Review of the Transition Roadmap and Procedure by the Working Group	8	3 days	Tue 09/04/25	Thu 11/04/25
Approval of the Transition Roadmap and Procedures by the Organisational Project Management Board	0	0 days	Tue 16/04/25	Tue 16/04/25
PMB	0		Tue 16/04/25	Tue 16/04/25
1.6.5 Pilot Project	190.83	66 days	Wed 27/03/25	Wed 26/06/25
1.6.5.1 Planning of the Pilot Project	24	3 days	Wed 27/03/25	Fri 29/03/25
1.6.5.2 Follow-up of the Pilot Project	144.83	60 days	Mon 01/04/25	Fri 21/06/25
1.6.5.3 Consolidation of results and review of the tailored PM <sup>2</sup> methodology based on the lessons learned	22	3 days	Mon 24/06/25	Wed 26/06/25
Pilot project completed	0	0 days	Wed 26/06/25	Wed 26/06/25
1.6.6 Follow-up of running projects transition	121.72	49 days	Thu 25/04/25	Tue 02/07/25
1.6.7 Analysis of the methodology adoption on outsourced projects (based on the reports and feedback from the Team Leaders)	16	3 days	Tue 25/06/25	Thu 27/06/25
1.6.8 Execution of the Workshop	40	7 days	Thu 27/06/25	Fri 05/07/25
1.6.8.1 Preparation of the Workshop (supporting documentation and logistics)	20	4 days	Thu 27/06/25	Tue 02/07/25
1.6.8.2 Execution of the Workshop	8	1 day	Wed 03/07/25	Wed 03/07/25

1.6.8.3 Evaluation of the Workshop and conclusions on adoption level	12	2 days	Thu 04/07/25	Fri 05/07/25
<b>Workshop performed</b>	<b>0</b>	<b>0 days</b>	<b>Fri 05/07/25</b>	<b>Fri 05/07/25</b>
<b>1.7 Business Implementation Management</b>	567.18	<b>92 days</b>	<b>Mon 04/03/25</b>	<b>Tue 09/07/25</b>
<b>1.7.1 Preparation &amp; communication of the Business Implementation activities</b>	12	3 days	Mon 25/03/25	Wed 27/03/25
<b>1.7.2 Production of the communication material</b>	70	11 days	Fri 29/03/25	Fri 12/04/25
1.7.2.1 Production of the material	53	6 days	Fri 29/03/25	Fri 05/04/25
Organisational Services	46		Fri 29/03/25	Fri 05/04/25
1.7.2.2 Sending material for printing	9	6 days	Fri 05/04/25	Fri 12/04/25
Organisational Services	8		Fri 05/04/25	Fri 12/04/25
1.7.2.3 Preparation and sending the Communication to External Entities	8	5 days	Mon 01/04/25	Fri 05/04/25
<b>Communication material delivered</b>	<b>0</b>	<b>0 days</b>	<b>Mon 15/04/25</b>	<b>Mon 15/04/25</b>
<b>1.7.3 Awareness Sessions</b>	66	<b>45 days</b>	<b>Mon 11/03/25</b>	<b>Fri 10/05/25</b>
1.7.3.1 Preparation of the Awareness Session 1	38	5 days	Mon 11/03/25	Fri 15/03/25
1.7.3.2 Execution of the Awareness Session 1	4	1 day	Fri 15/03/25	Fri 15/03/25
1.7.3.3 Preparation of the Awareness Session 2	20	2 days	Wed 08/05/25	Thu 09/05/25
1.7.3.4 Execution of the Awareness Session 2	4	1 day	Fri 10/05/25	Fri 10/05/25
<b>Awareness Sessions performed</b>	<b>0</b>	<b>0 days</b>	<b>Fri 10/05/25</b>	<b>Fri 10/05/25</b>
<b>1.7.4 Training</b>	146	<b>47 days</b>	<b>Mon 04/03/25</b>	<b>Tue 07/05/25</b>
1.7.4.1 Planning and scheduling training	14	2 days	Mon 04/03/25	Tue 05/03/25
1.7.4.2 PM <sup>2</sup> Certification Level 1 (20 people)	56	7 days	Mon 22/04/25	Tue 30/04/25
Organisational Training Services	56		Mon 22/04/25	Tue 30/04/25
1.7.4.3 PM <sup>2</sup> Certification Level 2 (5 people)	40	5 days	Mon 29/04/25	Fri 03/05/25
Organisational Training Services	40		Mon 29/04/25	Fri 03/05/25
1.7.4.4 PM <sup>2</sup> for Management (7 people)	12	3 days	Mon 29/04/25	Wed 01/05/25
1.7.4.5 Analysis of results	24	2 days	Mon 06/05/25	Tue 07/05/25
<b>Training completed</b>	<b>0</b>	<b>0 days</b>	<b>Tue 07/05/25</b>	<b>Tue 07/05/25</b>

<b>1.7.5 Interactions with PMO for projects monitoring</b>	<b>4</b>	<b>1 day</b>	<b>Tue 02/04/25</b>	<b>Thu 04/04/25</b>
<b>1.7.6 Meeting with the Representative of the External Entities for status &amp; feedback</b>	<b>2</b>	<b>1 day</b>	<b>Tue 02/07/25</b>	<b>Tue 02/07/25</b>
<b>1.7.7 Project Support Team activities:</b>	267.18	<b>52 days</b>	<b>Mon 29/04/25</b>	<b>Tue 09/07/25</b>
1.7.7.1 First level support for the PM <sup>2</sup> methodology	137.35	52 days	Mon 29/04/25	Tue 09/07/25
1.7.7.2 Execution of phase-exit and configuration mgt reviews of projects	59.83	47 days	Mon 29/04/25	Tue 02/07/25
1.7.7.3 Review the reporting to external entities	30	52 days	Mon 29/04/25	Tue 09/07/25
1.7.7.4 Updating of dashboard info and elaboration of consolidated reports	40	52 days	Mon 29/04/25	Tue 09/07/25

Scheduling and Resource Usage – Effort<sup>3</sup>

Effort in Hours of the Project Organisation									
Work Component Description	Project Owner Mr Y	Solution Provider Mr SP	Project Manager Ms A	Business Manager Mr X	PM <sup>2</sup> Mr N	PM <sup>2</sup> Ms M	Internal Contractor 1 Mr B	Internal Contractor 2 Ms C	Total
Project Management	35.47	10.13	303.59	112.49	42.07	42.07	30.07	30.07	605.96
Tailoring of PM <sup>2</sup> to Departmental needs	4	0	17	23.94	0	0	91.67	79.66	216.27
Departmental PM <sup>2</sup> Collaboration Tool	0	0	0	0	0	0	82	0	82
Central Project Repository	0	0	4	0	0	0	0	57	61
Set-up of the Project Support Team (PST)	0	0	0	0	0	0	29.5	37	66.5
Transition Management	4	4	86	40	0	110	0	170.55	414.55
Business Implementation Management (BIP)	0	0	8	78	76	0	130	137.18	429.18

Effort in Days of the Project Organisation												
Deliverable Description	Project Owner Mr Y	Solution Provider Mr SP	Project Manager Ms A	Business Manager Mr X	PM <sup>2</sup> Mr N	PM <sup>2</sup> Ms M	Internal Contractor 1 Mr B	Internal Contractor 2 Ms C	SUM	Total FTE	Project Total Cost	
Project Management	4.43	1.27	37.95	14.06	5.26	5.26	3.76	3.76	75.75	0.34	2,255.25	
Tailoring of PM <sup>2</sup> to Departmental needs	0.50	0.00	2.13	2.99	0.00	0.00	11.46	9.96	27.03	0.03	6,424.88	
Departmental PM <sup>2</sup> Collaboration Tool	0.00	0.00	0.00	0.00	0.00	0.00	10.25	0.00	10.25	0.00	3,075.00	
Central Project Repository	0.00	0.00	0.50	0.00	0.00	0.00	0.00	7.13	7.63	0.00	2,137.50	
Set-up of the Project Support Team (PST)	0.00	0.00	0.00	0.00	0.00	0.00	3.69	4.63	8.31	0.00	2,493.75	
Transition Management	0.50	0.50	10.75	5.00	0.00	13.75	0.00	21.32	51.82	0.15	6,395.63	
Business Implementation Management (BIP)	0.00	0.00	1.00	9.75	9.50	0.00	16.25	17.15	53.65	0.10	10,019.25	
PM <sup>2</sup> training courses									6,000.00		6,000.00	
Total	5.43	1.77	52.32	31.80	14.76	19.01	45.41	65.99				
Project Total FTEs (Effort per Year)	0.03	0.01	0.26	0.16	0.07	0.10			0.63	0.63	38,801.25	
Daily Rate of an Internal Contractor							300	300				
Total Cost per Internal Contractor							13621.5	19179.75				

Scheduling and Resource Usage – Budget<sup>4</sup>

Expenditure	2025		202(5+1)		202(5+2)		202(5+3)		202(5+4)		Total cost
	Budget Line	Amount	Budget Line	Amount	Budget Line	Amount	Budget Line	Amount	Budget Line	Amount	
Solution Development[2] (k€)	XX 01 02 11 04	32,801.25									32801.25
Solution Maintenance[3] (k€)			XX 01 02 11 04	16,400.63	XX 01 02 11 04	16,400.63	XX 01 02 11 04	16,400.63	XX 01 02 11 04	16,400.63	65602.5
Support [4] (k€)	XX 01 02 11 04	0.2 FTE	XX 01 02 11 04								0
Training[5] (k€)	XX 01 02 11 06	6000	XX 01 02 11 06		XX 01 02 11 06		XX 01 02 11 06		XX 01 02 11 06		6000
Infrastructure[6] (k€)	XX 01 02 11 04										0
<b>Total per year (k€)</b>		<b>38,801.25</b>		<b>16,400.63</b>		<b>16,400.63</b>		<b>16,400.63</b>		<b>16,400.63</b>	<b>104,404</b>
Total per year FTE staff [7]		0.5 FTE + 0.2 FTE		0.2 FTE		0.2 FTE		0.2 FTE		0.2 FTE	<b>1.5 FTE</b>

<sup>3</sup> 12.1.Project Work Plan-Scheduling and Resource Usage. Roll-Out of PM2.15-03-2025.v1.1<sup>4</sup> 12.1.Project Work Plan-Scheduling and Resource Usage. Roll-Out of PM2.15-03-2025.v1.1



Organisation [Name]  
Department [Name]

## Resource Plan

### Improvement of PM Practice

Date: 23/06/2025

Doc. Version: 1

Template version: 3.1



*This template is based on PM² V3.1*

**Document Control Information**

Settings	Value
Document Title:	Resource Plan
Project Title:	Improvement of PM Practice
Document Author:	<Insert First Name Last Name>
Project Owner:	<Insert First Name Last Name>
Project Manager:	<Insert First Name Last Name>
Doc. Version:	1
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**Document Approver(s) and Reviewer(s):**

NOTE: All Approvers are required. Records of each approver must be maintained. All Reviewers in the list are considered required unless explicitly listed as Optional.

Name	Role	Action	Date
<Insert First Name Last Name>	Project Owner	Approved	15/03/2025

**Document history:**

The Document Author is authorized to make the following types of changes to the document without requiring that the document be re-approved:

- Editorial, formatting, and spelling
- Clarification

To request a change to this document, contact the Document Author or Owner.

Changes to this document are summarized in the following table in reverse chronological order (latest version first).

Revision	Date	Created by	Short Description of Changes
1.1	15/03/2025	<Insert First Name Last Name>	Minor update of Section 1.2.

**Configuration Management: Document Location**

The latest version of this controlled document is stored in <Insert Departmental Document Repository Location>.

## 1. Resource Requirements

This project will need the following type of resources:

- People: 2 Staff and 2 internal contractors.
- Software: Collaboration platform services.
- Buildings & Facilities: Availability of rooms and related material for awareness sessions (for Contractors – 1 session and for staff – 2 sessions) and for the workshop. There is the need of an office room for the Project Support Team.
- PM<sup>2</sup> Services: Coaching of the project by 2 PM<sup>2</sup> experts.
- Organisational Communication & Printing Services: Production and printing of leaflets, posters and kick-start guides.
- Organisational Training Services: Availability of:
  - 5 courses (20 people) on "Project Management Certification – Level 1" and the certification exam (20 people);
  - 3 courses (7 people) on "PM<sup>2</sup> for Management";
  - 3 courses (5 people) on "Project Management Certification – Level 2" and the certification exam (5 people).

### 1.1. Resource Plan

Human Resources						
Resource ID	From Date	To Date	Resource	Skill	Skill Level	Quantity
H.1	15/01/25	11/07/25	Head of Department - Mr Y	Project Owner	Experienced	1
H.2	22/02/25	11/07/25	Deputy of the Head of Department - Mr SP	Solution Provider	Experienced	1
H.3	11/01/25	12/07/25	Deputy of the Head of Department - Mr X	Business Manager	Experienced	1
H.4	01/02/25	12/07/25	Team Leader - Department Team 2 - Ms A	Project Manager	Experienced	1
H.5	26/02/25	09/07/25	Internal contractor 1 - Mr B	Project Manager	Intermediate	1
H.6	26/02/25	09/07/25	Internal contractor 2 - Ms C	Project Manager	Intermediate	1
H.7	22/02/25	09/07/25	PMO Mr N	PM <sup>2</sup> Expert	Experienced	1
H.8	22/02/25	09/07/25	PMO Ms M	PM <sup>2</sup> Expert	Experienced	1

Other Resources					
Resource ID	From Date	To Date	Resource	Characteristics	Quantity
M.1	05/04/25	Indefinitely	Collaboration platform services	Flexible Platform for Internet Services	1
M.2	09/04/25	Indefinitely	Collaboration platform services	Collaboration platform Team	1
M.3	29/03/25	12/04/25	Production & printing of communication material	Organisational Communication & Printing Services Leaflets: 300 items Posters: 100 items Kick-start guides: 200 items	1
M.4	22/04/25	03/05/25	PM <sup>2</sup> Training	- 5 courses (20 people) on " <b>Project Management Certification – Level 1</b> " and the <b>certification exam</b> (20 people); - 3 courses (7 people) on " <b>PM<sup>2</sup> for Management</b> "; - 3 courses (5 people) on " <b>Project Management Certification – Level 2</b> " and the <b>certification exam</b> (5 people).	11
M.5	03/04/25	03/04/25	Contractors Awareness Session - Room	30 seats	1
M.6	15/03/25	15/03/25	Internal staff Awareness Session 1 - Room	100 seats	1
M.7	10/05/25	10/05/25	Internal staff Awareness Session 2 - Room	100 seats	1
M 8	03/07/25	03/07/25	Workshop Session - Room	50 seats	1
M 9	18/04/25	Indefinitely	Project Support Team - Office	2 seats	1

## 1.2. Cost of Resources

All Resources				
Resource ID	Resource	Cost per Department'	No. of Department's	Total cost
H.1	Head of Department - Mr Y		0.03 FTE	
H.2	Deputy of the Head of Department - Mr SP		0.01 FTE	
H.3	Deputy of the Head of Department - Mr X		0.16 FTE	
H.4	Team Leader - Department Team 2 - Ms A		0.26 FTE	
H.5	Internal contractor 1 - Mr B	300 €	45 days	13,621 €
H.6	Internal contractor 2 - Ms C	300 €	64 days	19,180 €
H.7	PMO Mr N		0.07 FTE	
H.8	PMO Ms M		0.1 FTE	
M.1	Collaboration platform services		0	0
M.2	Collaboration platform services		0	0
M.3	Production & printing of communication material		6 days	0
M.4	PM <sup>2</sup> Training - certification		25	6,000 €
M.5	Contractors Awareness Session - Room		0	0
M.6	Internal staff Awareness Session 1 - Room		0	0
M.7	Internal staff Awareness Session 2 - Room		0	0
M.8	Workshop Session - Room		0	0
M.9	Project Support Team - Office		0	0

## 2. Resource Constraints

### 2.1. Availability

N/A.

### 2.2. Capacity

N/A.

### 3. Contingencies

Resource ID	Resource	Contingency	Comments
H.5	PMO Mr N	5 days	Department agreed with organisational PMO a pack of 20 days for this resource.
H.6	PMO Ms M	5 days	Department agreed with organisational PMO a pack of 24 days for this resource.

### 4. Training Needs

The training on the PM<sup>2</sup> Methodology will be provided to the whole project team, namely:

- 5 courses on "Project Management Certification – Level 1" and the certification exam for the Business Manager, Project Manager and PCT;
- 3 courses on "Project Management Certification – Level 2" and the certification exam for the Project Manager;
- 3 courses on "PM<sup>2</sup> for Management" for the Project Owner, Business Manager and Solution Provider.

Resource ID	Resource	Training/Skill	Current skill level	Desired skill level	Method of Delivery	Delivered by	Target Delivery Date
H.1	Head of Department - Mr Y	Project Management Methodology	Project management concepts without knowing PM <sup>2</sup>	Knowledge of PM <sup>2</sup> roles & responsibilities, lifecycle and artefacts	Online Training	HR Training Services	03/05/25
H.2	Deputy of the Head of Department - Mr SP	Project Management Methodology	Project management concepts without knowing PM <sup>2</sup>	Knowledge of PM <sup>2</sup> roles & responsibilities, lifecycle and artefacts	Online Training	HR Training Services	03/05/25
H.3	Deputy of the Head of Department - Mr X	Project Management Methodology	With some knowledge of PM <sup>2</sup> , although not certified	Project Management Certification – Level 1	Online Training	HR Training Services	03/05/25
H.4	Team Leader - Department Team 2 - Ms A	Project Management Methodology	With some knowledge of PM <sup>2</sup> , although not certified	Project Management Certification – Level 1	Online Training	HR Training Services	03/05/25
H.5	Internal contractor 1 - Mr B	Project Management Methodology	With some knowledge of PM <sup>2</sup> , although not certified	Project Management Certification – Level 1	Online Training	HR Training Services	03/05/25
H6	Internal contractor 2 - Ms C	Project Management Methodology	With some knowledge of PM <sup>2</sup> , although not certified	Project Management Certification – Level 1	Online Training	HR Training Services	03/05/25

**Appendix 1: References and Related Documents**

ID	Reference or Related Document	Source or Link/Location
1	04.Project_Handbook.Roll-out of PM2.15-03-2025.v1.1.docx	<Insert Project Repository Location>
3	12.1.Project_Work_Plan-Scheduling and Resource Usage.Roll-out of PM2.15-03-2025.v1.1.xlsx	<Insert Project Repository Location>
4	12.Project_Work_Plan.Roll-out of PM2.15-03-2025.v1.1.docx	<Insert Project Repository Location>
	Project folder	<Insert Project Repository Location>

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Organisation [\[Name\]](#)  
Department [\[Name\]](#)

# **Business Implementation Plan**

## **Improvement of PM Practice**

Date: 23/06/2025  
Doc. Version: 1  
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*This template is based on PM² V3.1*

**Document Control Information**

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<Insert First Name Last Name>	Project Owner	Approved	15/03/2025

**Document history:**

The Document Author is authorized to make the following types of changes to the document without requiring that the document be re-approved:

- Editorial, formatting, and spelling
- Clarification

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Changes to this document are summarized in the following table in reverse chronological order (latest version first).

Revision	Date	Created by	Short Description of Changes
1.1	15/03/2025	<Insert First Name Last Name>	Minor update of Section 2.2

**Configuration Management: Document Location**

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## 1. Introduction

The Business Implementation Plan aims to describe the activities that will support the change in the way people manage and control projects. The objectives of these activities are the following:

- Explain to Department's staff, external entities and contractors the new way of managing projects using PM<sup>2</sup> and its advantages.
- Give training to PM<sup>2</sup> users in order to have skilled staff.
- Communicate the changes to all stakeholders through leaflets, posters and quick-start guide.
- Clarify and support all PM<sup>2</sup> users during the change process.
- Monitoring and report the level of PM<sup>2</sup> adoption.
- Boost the quality of project management information by performing quality reviews and reporting on key indicators.

## 2. Impact On Processes

The roll-out of PM<sup>2</sup> in the Department will have a significant impact on the project management processes used by 80% of the Department's resources. The ad-hoc way of working will be replaced by standard and documented processes (PM<sup>2</sup> methodology). Moreover, the set-up of a Project Support Team will impact the current roles and responsibilities and create new processes related to project monitoring, control and reporting. For supporting the organisational change, awareness sessions, training, communication materials and a Project Support Team will be provided.

The existing process for outsourcing' monitoring will have a moderate impact. This process will be adapted to the PM<sup>2</sup> methodology and aligned with the procurement requirements. The Outsourcing Plan will be mandatory for all projects with an outsourced component. Additionally, the PM<sup>2</sup> Project Progress Report will be tailored to outsourced components/projects and requested to Contractors on a regular basis. For on-going projects, the new requirements will be agreed on by Contractors and communicated through awareness sessions.

Finally, the "Progress and Financial reporting" process will have small updates on the reporting artefacts. These small changes will be formally communicated to all external entities using these reports.

## 3. Impact On People

As already mentioned, the roll-out of PM<sup>2</sup> in the Department will impact 80% of the Department's resources. The main impact is related to changes on the project management governance model (roles & responsibilities) and on the project management processes. With the roll-out of PM<sup>2</sup>, the effort of collecting and analysing project management information will be reduced and the extra effort will be allocated to quality assurance and control activities, mainly performed by the Project Support Team. Additionally, Senior Management will have more relevant information for supporting their decisions.

## 4. Impact On the Organisational Culture

The Department's culture will be highly affected, from an informal environment to a clear definition of processes and roles. Despite the increase on formality, the organisational culture change should not be very challenging, as people are demanding for formal and standard procedures and demotivated by the current situation as considered a "waste of resources and effort". Furthermore, PM<sup>2</sup> is already customised to the organisational environment, facilitating the adoption of the methodology and having a mature support and training services available.

## 5. Business Implementation Strategies and Activities

The approach for a full PM<sup>2</sup> adoption within the Department is defined as following:

- Inform all stakeholders in a kick-start awareness session about what PM<sup>2</sup> is and the main advantages in terms of project efficiency and control. Present the roadmap for PM<sup>2</sup> adoption and the different available mechanisms for supporting users.

- Involve the main stakeholders from the beginning (creation of a project working group at the end of the Planning Phase).
- Set-up of multiple interactions with the main stakeholders for project status and feedback (Department's Project Managers, External Entities, Contractors, Working Group, Procurement, Portfolio Office and PMO), in the form of meetings, awareness sessions, workshops, written communications, promotional material and first line support.
- Give training to all potential PM<sup>2</sup> users and involve them in the PM<sup>2</sup> Community of Practice.
- Communicate the "To Be" project management governance, processes and artefacts on a second awareness session.
- Perform quality assurance and control by executing configuration management and artefacts reviews and report on project's adherence to PM<sup>2</sup>.
- Set-up a clear and agile change management process to be able to timely incorporate the feedback from the different stakeholders.

### 5.1. Communications Strategy

The project communication strategy is described in the Communications Management Plan. The main communication items related to business implementation are mentioned below:

- **Promotional materials:** Leaflets, posters and quick-star guides.
- **Written communication** to External Entities.
- **Meetings:**
  - Meeting with the Representative of the External Entities for status & feedback.
  - Interactions with the PMO for projects monitoring.
- **Awareness sessions:**
  - Awareness Session 1: For explaining PM<sup>2</sup> and the roadmap for PM<sup>2</sup> implementation.
  - Awareness Session 2: For presenting the "To Be" situation.
- **First line support:** The Project Support Team will be assisting PM<sup>2</sup> users through the change and collecting feedback.
- **Reports:** The Project Support Team will produce reports on the adherence of Department's projects to PM<sup>2</sup> and the main constraints and on Department's projects quality.
- **Dashboard:** Communication on key project' performance indicators.

### 5.2. Timing and Milestones

The scheduling of the business implementation activities are detailed in the 12.1 Project Work Plan – Scheduling and Resource Usage. The location of this artefact is referred in the Appendix 1.

### 5.3. Project Promotion Activities

The promotional activities are described in the above section 5.1 Communications Strategy.

### 5.4. Change Activities

#### 5.4.1. Project Activities

The activities that will fall within the project' direct responsibilities are the following ones:

- Preparation & communication of the Business Implementation activities.
- Production of the communication materials.

- Awareness sessions.
- Training.
- Interactions with PMO for projects monitoring.
- Meeting with the Representative of the External Entities for status & feedback.
- Project Support Team activities.

For more details, please see the Project Work Plan. The location of this artefact is referred in the Appendix 1.

The control of the business implementation activities will be performed by reviewing the Project Work Plan and by validating the Business Implementation Checklist. The location of this artefact is referred in the Appendix 1.

#### **5.4.2. Change Activities for the Permanent Organisation**

The roll-out of PM<sup>2</sup> will cover the definition and implementation of new processes for managing projects and also the updating of processes interfaces with other organisational processes.

The implementation of these new processes will need a period of around 6 months for validating if they are implemented in the most efficient way. During this validation period, opportunities for improvement should be identified in the Change Log and then discussed with the main stakeholders, i.e. Project Managers, Senior Management, Procurement, Portfolio Office and PMO. For this purpose, the Project Owner may set-up a Working Group including these stakeholders, after the project ends, to follow-up post-project activities.

#### **5.4.3. Post-Project Activities**

One of the post-project activities planned for July is the coaching (performed by the Project Support Team) of project 1. This activity was initially on project scope but in result of a demand from the Project Owner of project 1, the transition process was delayed until July.

Considering the additional objectives and project benefits, it is recommended to set-up a Working Group with the following purposes:

- Continue to follow-up PM<sup>2</sup> adoption and analyse the benefits/outcomes of its implementation.
- Identify opportunities for improvement and purpose actions.
- Promote the PM<sup>2</sup> adoption in other Departments and define a roadmap for implementation.
- Encourage organisation staff and newcomers to follow PM<sup>2</sup> training courses and to perform the certification exams, in order to keep the project management expertise within organisation.
- Involve PMO in some meetings to maintain the close collaboration and obtain some support in the post-project activities if needed.

#### **5.4.4. Benefits Tracking**

As already documented in the Business Case, this project will support the achievement of the objectives of the Department, by increasing the maturity of project management within the Department. Most of the benefits are obtained on medium and long term and can be only correctly measured after project ends.

The estimation of the benefits comprises no need of further resources to manage the new programme, reduction of the costs on outsourced contracts and ability to cover more projects within the budget and to achieve more outcomes.

The main expected benefits are measured as following:

- Improved alignment of project with Department/Business Domain/Organisational strategic objectives (maximisation of investments value):
  - 90% of the new projects within the Department are regularly monitored (Organisation' project portfolio dashboard) by Senior Management in the appropriate Meetings.
- More successful projects delivering on time within budget and improved quality of project deliverables and increased project productivity allowing the Department to achieve more with the same resources and budget:
  - 20% increase in successful completion of projects (measured 1<sup>st</sup> of January 2025+ 2 years for projects completed during 2025 + 1 year).
  - All non-conformities identified by the Internal Audit Services from last audit are addressed by the new methodology.
- Projects are following organisational governance process and being monitoring and controlled by the Project Management Office of the organisation:
  - All new projects within the Department (started from the 1<sup>st</sup> of January 2025 + 1 year) are evaluated by the Organisation' Governance Bodies for approval.
  - Organisation' Project Management Office are monitoring and controlling all new projects within Department (started from the 1<sup>st</sup> of January 2025 + 1 year) and running projects with remaining duration >3 months.
- Improved outsourced contractor' performance:
  - 20% increase in successful completion of outsourced projects (measured 1<sup>st</sup> of January 2025 + 2 years for projects completed during 2025 + 1 year).
- Improved image of Department and Organisation:
  - 50% decrease of complains from other Departments/Organisation/Externals Entities (measured 1<sup>st</sup> of January 2025 + 2 years, counting all complains during 2025 – 1 year vs 2025 + 1 year).

**Note:** the baseline for measuring the benefits is the set of projects completed during 2025 – 1.

## 6. Training Needs and Activities

This project is considering the PM<sup>2</sup> users training as one of the project deliverables, and it is structured in the following way:

- Training of all Project Managers, Business Managers and Project Core Team members (total of 20 people) to the level 1 of PM<sup>2</sup> Certification.
- Training 5 Project Managers to the level 2 of PM<sup>2</sup> Certification.
- Training 5 Head of Sectors, 1 Deputy of the Head of Department and 1 Head of Department through the PM<sup>2</sup> for Management path.

The training courses are coordinated by the Business Manager and delivered by HR. Special sessions are already available for the Department' staff and an email from the Project Owner has been sent to all staff for registering in the courses. The training documentation will be delivered by HR.

**Appendix 1: References and Related Documents**

ID	Reference or Related Document	Source or Link/Location
1	04.Project_Handbook.Roll-out of PM2.15-03-2025.v1.1.docx	<Insert Project Repository Location>
2	12.Project_Work_Plan.Roll-out of PM2.15-03-2025.v1.1.docx	<Insert Project Repository Location>
3	12.1.Project_Work_Plan- Scheduling and Resource Usage.Roll-out of PM2.15-03-2025.v1.1.xlsx	<Insert Project Repository Location>
4	31.Business_Implementation_Checklist Roll-out of PM2.15-03-2025.v1.1.xlsx	<Insert Project Repository Location>
5	Project folder	<Insert Project Repository Location>

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Organisation [Name]  
Department [Name]

# Transition Plan

## Improvement of PM Practice

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Settings	Value
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1.1	15/03/2025	<Insert First Name Last Name>	Minor update of Section 2

**Configuration Management: Document Location**

The latest version of this controlled document is stored in <Insert Departmental Document Repository Location>.

## 1. Introduction

The objectives of the Transition Plan are:

- To identify and document the transition goals.
- To ensure the smooth transition from the "project mode" to the "operations mode".
- To identify the pre-requisites for rolling out the project deliverables.
- To prepare the transition of the responsibility for the outcome of the project from the project team to the performing organisation.

## 2. Transition Goals and Activities

### 2.1. Goals

Transition is one of the most relevant work components within the project and it aims to manage a smooth transition of Department' on-going projects from current way of working to apply PM<sup>2</sup> methodology. Moreover, a new project management governance will be in place, so the transition includes the set-up of a Project Support Team and the updating of the roles and responsibilities.

Transition management will include the following deliverables:

#### Transition Roadmap:

This roadmap is the "big picture" of how and when on-going projects will change the project management methodology from "As Is" to "To Be" – PM<sup>2</sup> methodology. Moreover, a new project management governance will be in place, so the transition roadmap also identifies from when the new governance will be operational, e.g. the Project Support Team.

The transition roadmap will be based on the following principles:

- Projects that are predicted to end until the 31<sup>st</sup> of July 2025 will not transition to the PM<sup>2</sup> methodology.
- Projects transition should be performed between 23<sup>rd</sup> of April until the 3<sup>rd</sup> of July 2025.
- The PM<sup>2</sup> artefacts for each project should be placed in the Central Project Repository, according to the defined procedures.
- **Transition Procedures for users:** elaboration of detailed procedures to help the Project Managers to handle transition.

#### Pilot Project:

When identifying the "As Is" processes, the pilot project will be selected from the portfolio of projects. The Project Core Team (PCT) will follow the pilot on a weekly basis, attending the Pilot Project Follow-up Meetings. The agenda of these meetings will include the discussion of the benefits and constraints found when applying the methodology and the opportunities for improvement.

#### Workshop:

The workshop will invite all Project Managers and Business Managers within the Department and will consist of the discussion of the Department' projects status related to the adoption of the methodology and the main constraints faced during the transition process. The aim of the workshop is to agree on solutions for the identified pitfalls.

### 2.2. Prerequisites

Projects transition should start after the tailored methodology is approved and available for use. The transition milestones will be detailed in the transition roadmap and published on the Collaboration tool.

Additionally, this roadmap will be announced by email. Department' on-going projects should perform the transition according to the roadmap and Project Managers will be supported by the Project Core Team during the transition period.

Concerning the pilot project, the characteristics that the selected project needs to fulfil are:

- Being a project managed within the Department.
- The project should begin in March 2025.
- The duration of the project should be around 3 months.
- The Project Manager is motivated and willing to drive the pilot.

### 2.3. Timing and Milestones

The main transition milestones are as following:

- Approval of the Transition Roadmap and Procedures by the Organisational Project Management Board (16/04/25).
- Pilot project completed (26/06/25).
- Workshop performed (05/07/25).

### 2.4. Activities

The transition activities include the documentation of a transition roadmap and specific procedures to be applied by PM<sup>2</sup> users during transition, the execution of a pilot in order validate the applicability of each artefact and process, the monitoring of projects transition, including outsourced projects, to timely act upon any constraint, and finally the workshop to clarify any issue and guarantee that every Department' project is succeeding in the transition process.

Activities Description	Estimated Effort	Start-End Dates	Resource	Other Comments
1.6.1 Documentation of the detailed Transition Roadmap	12 hours	02/04/25 03/04/25	<Insert First Name Last Name>	
1.6.2 Elaboration of the Transition Procedures for users	18 hours	04/04/25 08/04/25	<Insert First Name Last Name>	
1.6.3 Review of the Transition Roadmap and Procedures by the PSC	14 hours	12/04/25 12/04/25	<Insert First Name Last Name>	
1.6.4 Review of the Transition Roadmap and Procedure by the Working Group	8 hours	09/04/25 11/04/25	<Insert First Name Last Name>	
1.6.5 Pilot Project	191 hours	27/03/25 26/06/25	<Insert First Name Last Name>	

1.6.6 Follow-up of running projects transition	122 hours	25/04/25 02/07/25	<Insert First Name Last Name>	
1.6.7 Analysis of the methodology adoption on outsourced projects (based on the reports and feedback from the Team Leaders)	16 hours	25/06/25 27/06/25	<Insert First Name Last Name>	
1.6.8 Execution of the Workshop	40 hours	27/06/25 05/07/25	<Insert First Name Last Name>	

The transition management activities are detailed in the 12.1 Project Work Plan – Scheduling and Resource Usage. The location of this artefact is referred in the Appendix 1.

## 2.5. Responsibilities

The transition responsibilities are detailed in the 12.1 Project Work Plan – Scheduling and Resource Usage. The location of this artefact is referred in the Appendix 1.

## 2.6. Coordination Aspects

The transition from the "As Is" to the "To Be" situation will be coordinated between the project team and other stakeholders such as Contractors, Working Group, Procurement, Portfolio Office and PMO. Moreover, the Department' project teams are informed through the awareness session of the transition roadmap and of the procedures to handle transition and they will be continuously supported by this project team during the transition period. This support will be provided in meetings with the Project Managers.

## 3. Communication

The transfer from "project mode" to "operations" will be performed after the formal deliverables acceptance. The Solution Provider will send an email to the relevant stakeholders announcing the formal transfer of responsibilities from the project team to the Project Owner.

For the complete list of project communications please see the Communications Management Plan. The location of this artefact is referred in the Appendix 1.

## 4. Specific Transition Activities

### 4.1. Required Backups

Department' projects will be transferred from the several directories to the Central Project Repository. The backup procedures will be detailed in the configuration management procedures for the Department' Project Repository and Lessons Learned database (this activity is incorporated in the Project Work Plan).

### 4.2. Management of the Environment

The access management requirements of the Central Project Repository will be detailed in the configuration management procedures for repository administration.

### 4.3. Acceptance Clearance

The main milestones and activities for project acceptance are:

Date: 23.06.2025

5/7

Doc. Version: 1

- Approval of the tailored PM<sup>2</sup> Methodology by the Organisational Project Management Board.
- Approval of the Transition Roadmap and Procedures by the Organisational Project Management Board.
- Pilot project completed.
- Deliverables review.
- Elaboration of the Quality Review Report (based on the pilot + configuration reviews + workshop + follow-up of running projects transition).
- Review of project achievements & formal deliverables acceptance (PSC).
- Project Final Acceptance (Project Acceptance Note).

#### **Testing**

N/A

#### **System and Data Conversion**

N/A

#### **4.4. Training**

The training plan is detailed in the 14. Business Implementation Plan. The location of this artefact is referred in the Appendix 1.

#### **4.5. Maintenance and Support**

The maintenance and support of the PM<sup>2</sup> methodology will be mainly given by the Project Support Team and, at a second level support, by organisational PMO.

#### **5. Transfer of Responsibility**

As already referred above, the transfer from "project mode" to "operations" will be performed after the formal deliverables acceptance. The Solution Provider will send an email to the relevant stakeholders announcing the formal transfer of responsibilities from the project team to the Project Owner.

#### **6. Rollback Scenario & Plan**

As this project is using several interactions to validate deliverables by different stakeholders, the rollback plan is to extend the effort of updating deliverables in result of the feedback and ask for more support from PMO, if needed.

#### **7. Transition Checklist**

The Transition checklist can be found here [<Insert Project Repository Location>](#).

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2	09.Communications_Management_Plan.Roll-out of PM2.15-03-2025.v1.1.docx	<Insert Project Repository Location>
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4	12.1.Project_Work_Plan-Scheduling and Resource Usage.Roll-out of PM2.15-03-2025.v1.1.xlsx	<Insert Project Repository Location>
5	14.Business_Implementation_Plan.Roll-out of PM2.15-03-2025.v1.1.docx	<Insert Project Repository Location>
6	30.Transition_Checklist.Roll-out of PM2.15-03-2025.v1.1.xlsx	<Insert Project Repository Location>
7	Project folder	<Insert Project Repository Location>

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## Risk Log<sup>1</sup>

Risk Identification and Description							Risk Assessment				Risk Response				
ID	Category	Risk Name	Risk Description & Details	Status	Identified By	Identification Date	Likelihood	Impact	Risk Level (L*I)	Risk Owner	Escalation	Risk Response Strategy	Action Details (effort & responsible)	Target Date	Traceability/Comments
RLO 1	People & Organisation	Resistance to change	Resistance to change that will result on Project Managers not following the methodology.	Approved	<Insert First Name Last Name>	22/02/2025	2	4	8	PO	Yes	Reduce	The project is planning 3 actions related to this risk: 1. Two awareness sessions at the beginning and end of the executing phase and one workshop before PM² becomes officially operational, for collecting issues and recommendations from the transition experience. 2. Training sessions for PMs that will enable them to follow the methodology. 3. Project Support Team: will support	05/07/2025	

<sup>1</sup> 23.Project\_Logs.Roll-Out of PM2.01-03-2025.v1.1

RLO 2	Business	Methodology does not fit Department's needs	The chosen methodology is not fitting Department's needs and major tailoring is needed, impacting the delivery date.	Approved	<Insert First Name Last Name>	22/02/2025	2	5	10	PO	Yes	Reduce	PMs in the use of the methodology and act as a facilitator to the change process.	26/06/2025	
RLO 3	People & Organisation	Absence of project sponsoring	Absence of project sponsoring, so other Department's activities will take priority above this project.	Rejected	<Insert First Name Last Name>	22/02/2025				PO			Performance of a Pilot project to verify adequacy of the methodology to the Department's projects. This pilot will be an internal project that will start in March until June 2025. Regular follow-up will guarantee that issues are timely identified and acted-upon.		

RLO 4	Business	A new release of PM² is delivered during project lifecycle	A new release of PM² is delivered during project lifecycle, resulting into two situations: adapting to the new release or use an outdated version.	Closed	<Insert First Name Last Name>	22/02/2025	4	4	16	PO	Yes	Reduce	Meeting with PMO team to identify the planning for next releases or updates. The meeting occurred on the 22/02/2013 and a new release is planned for the 31st of May. Considering that this will happen in the middle of this project, it was decided by the PSC that the current methodology will be the basis for the tailoring and the artefacts updates will be performed after the project ends (out of the scope of this project).	25/02/2025	
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RL0 5	Business	Projects delay	Delay of more than 2% on schedule for some projects within Department, during implementati on.	Approv ed	<Insert First Name Last Name>	22/02/2025	3	4	12	PO	Yes	Reduce	Project Support Team: will support PMs in the use of the methodology and act as a facilitator to the change process. Additionally, this Office will monitor projects and recommend actions to the PSC.	09/07/20 25	
RL0 6	People & Organisati on	Decrease in productivit y	Decrease in productivity due to learning curve effects that will impact projects' schedules.	Approv ed	<Insert First Name Last Name>	22/02/2025	3	3	6	PO	No	Accept	This impact is expected and a delay is already foreseen (less than 2% on schedule).		

RL0 7	People & Organisati on	Lack of support from key- stakeholde rs	Lack of support from key- stakeholders that will result on limited adherence to the new methodology.	Approved	<Insert First Name Last Name>	22/02/2025	2	4	8	PO	Yes	Reduce	The project is planning awareness sessions, workshops and training sessions to involve all the stakeholders. Additionally, communication material will be delivered to support the change. Moreover, a Project Support Team will follow the adherence to the methodology and identify any issue if occurs. Other Departments, organisations, contractors and external entities will be involved in working groups, awareness sessions and tailored communication s.	05/07/20 25	
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RL08	People & Organisation	Unavailability of courses for PM <sup>2</sup> courses	Unavailability of courses for the selected project management method (fully booked) that will delay training activity.	Approved	<Insert First Name Last Name>	22/02/2025	3	4	12	PO		Reduce	Special training courses will be available for the Department. This has been arranged with PMO and with the Training Services.	05/03/2025	
RL09	External	Delays on contractors' projects	Delays on contractors' projects caused by the mismatch of the methodology with the project management approach of contractors.	Approved	<Insert First Name Last Name>	22/02/2025	3	4	12	PO		Reduce	For the running projects, meetings with Contractors will be planned to present the methodology and agree on the expected outputs. For all projects, each Contractor will be able to attend an awareness session.	04/04/2025	
RL10	People & Organisation	Lack of support from other Departments	Lack of support from other Departments, such as Procurement Department.	Approved	<Insert First Name Last Name>	22/02/2025	1	4	4	PO		Accept	The likelihood for this risk is very low. Additionally, it is planned the creation of a Working Group to align objectives and requirements. Moreover, a meeting with the Procurement Department is planned to identify their	18/03/2025	

RL1 1	Business	Lack of available budget	Lack of available budget caused by delays in yearly budget approval.	Approved	<Insert First Name Last Name>	22/02/2025	2	5	10	PO						main requirements.	05/07/2025		
RL1 2	People & Organisation	Gap of skills	Unavailability of resources with the necessary skills.	Approved	<Insert First Name Last Name>	22/02/2025	1	5	5	PO			Accept			This risk is unlikely to happen, as the project will be supported by PMO and a training programme is foreseen for the Project Core Team (PM <sup>2</sup> Certification level 2).	07/05/2025		

## Issue Log<sup>2</sup>

Issue Identification and Description							Issue Assessment and Action Description							
ID	Category	Title	Description	Status	Identified By	Identification Date	Action Details (effort & responsible)	Urgency	Impact	Size	Target Date	Issue Owner	Escalation	Traceability/Comments
IL1	Business	Transition Roadmap updating	After discussing the transition roadmap with the Working Group, it was identified that the project 1 has a critical milestone during the transition period. For the rest of the Department' projects, the chosen period is okay. If the project is obliged to perform the transition, there is a high probability that this critical milestone will be impacted.	Open	<Insert First Name Last Name>	11/04/2025	One of the scenarios is to postpone the transition of this single project in July, already with the support of the Project Support Team. The other scenario is to add resources to the concerned project team, in order to help the transition to the PM² methodology. The estimated effort is 7FTE. The decision will be taken by the next PSC.	5	2	2	31/07/2025	PSC	Yes	The solution will be presented at the next PSC

<sup>2</sup> 23.Project\_Logs.Roll-Out of PM2.01-03-2025.v1.1

## Change Log<sup>3</sup>

Identification							Assessment				Decision			Implementation		
ID	Category	Title	Description	Status	Requested by	Date Identified	Action Details (effort & responsible)	Size	Priority	Target Delivery Date	Escalation	Decision	Decided by	Decision Date	Actual Delivery Date	Traceability/Comments
CL 1	Issue	Transition Roadmap updating	Update the transition roadmap with the special situation of project 1.	Approved	Working Group	11/04/2025	The Transition Roadmap should be updated. Additionally, the Project Support Team should plan the coaching of the transition of this project in their activities for July. The implementation of this change will be performed today by the PCT, as the Transition Roadmap needs to be approved next Monday (16/04/2025) by the PMB.	2	5	12/04/2025	Yes		PSC	12/04/2025	12/04/2025	IL1; DL1

<sup>3</sup> 23.Project\_Logs.Roll-Out of PM2.01-03-2025.v1.1

Decision Log<sup>4</sup>

Identification							Ownership			Implementation	
ID	Category	Title	Description	Initiated by	Persons present during decision	Comments	Decision Owner	Decision Date	Escalation	Application Date	Decision communicated to:
D01	Business	Partial transition of project 1	The decision agreed by the PSC is to have a progressive transition of project 1 (enlarge the transition period until July), but the reporting artefacts should follow the planned transition roadmap.	<Insert First Name Last Name>	<Insert First Name Last Name>		PSC	12/04/2025	Yes	12/04/2025	Working Group and to the Project Manager of project 1.

<sup>4</sup> 23.Project\_Logs.Roll-Out of PM2.01 -03-2025.v1.1



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## **PM<sup>2</sup> Project Management Methodology Study Case**

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