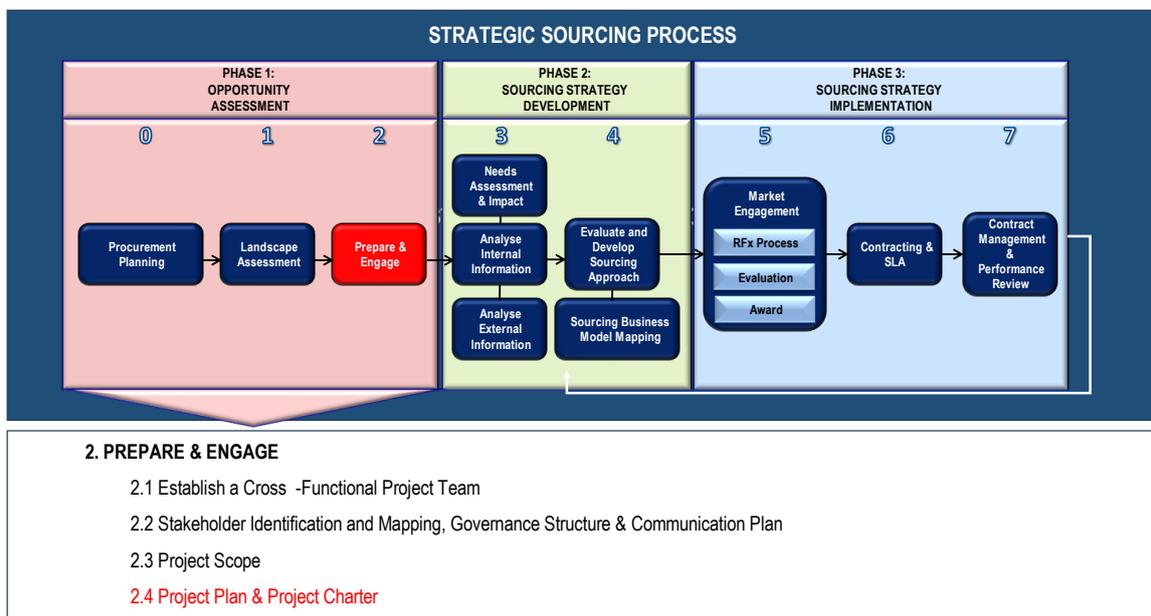


Using this guide

This guide accompanies the National Treasury's Strategic Procurement Framework (SPF) for Strategic Sourcing in the Public Sector. For more information, visit the National Treasury website at <http://ocpo.treasury.gov.za/>
The SPF can be found here:
http://ocpo.treasury.gov.za/Resource_Centre/Documents/1A.%20Strategic%20Procurement%20Framework.pdf

PROJECT PLAN & PROJECT CHARTER



1.0 Introduction

- i. The project charter defines the scope, objectives, milestones and the people involved in the project.
- ii. The following good practice guides and templates are applicable when consolidating a project plan and project charter:
 - a. Project plan
 - b. The project charter
 - c. Project plan (template)
 - d. Project charter (template)
 - e. Project implementation plan (template)

1.1 The objective

- i. The project charter is a statement of the scope, objectives and participants in a project and is a critical document to ensure that everyone involved in the project is aware of its purpose and objectives.
- ii. It outlines the project objectives, identifies the main stakeholders, defines the boundaries and stipulates the authority of the project manager.
- iii. It serves as a reference of authority for the future of the project and its management.
- iv. The project plan outlines the duration of activities and the major milestones to be achieved.

1.2 The output

- i. A project plan and project charter

2.0 Good practice guide

2.1 Project plan

- i. A plan is a means of achieving an objective.
- ii. In the same manner, a project plan is a means of achieving the project objectives.
- iii. It brings together a few individual plans to form the baseline plan.
- iv. Using any project management software to update and agree timelines with the project team.
- v. The project plan needs to be updated weekly, indicating current progress as well as changes to the original plan.

2.2 Project approval process

Step 1	Confirm that all deliverables have been verified and confirmed with the project sponsor and check if all the internal processes have been followed.
Step 2	Identify the people who you need to seek sign-off from, and how to contact them, i.e. some stakeholders may require email or written sign-off.
Step 3	Send the sign-off requests in the correct format and make the request time-limited, this should ensure a timely return and will give the requester a clear indicator of when to follow up.
Step 4	Deal with any last-minute requests, amendments, or queries that may come from people before they offer their approval – strong relationships with the client should prevent major issues.
Step 5	Log receipt of approvals and ensure that documents are updated to reflect who has signed off and when.

Step 6	Send all the approvals for archiving in line with your institution's document management processes so they can easily be referred to in the event of future issues.
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Table 1: Project approval process

2.3 The project charter

- i. The project charter is a document that states a project exists and provides the project manager with written authority to begin work.
- ii. The document helps the project manager to communicate their authority and explain to project participants and stakeholders why the project is needed, whom it involves, how long the project will take to complete, how much it will cost, what resources are needed and how successful completion of the project will help the organisation. Once created, the document is rarely (if ever) amended.
- iii. Project charter templates often include the following components:
 - a. Project goal - documents the reasons for undertaking the project in clear, concise language;
 - b. Project participants - identifies what people need to be involved in the project and clearly states their roles;
 - c. Stakeholders - identifies other people who will be directly affected by the project and need to know about the project's progress;
 - d. Requirements - identifies what resources are required for the project's objectives to be achieved;
 - e. Constraints - documents potential roadblocks or bottlenecks;
 - f. Milestones - identifies start date and completion dates as well as dates for other important checkpoints;
 - g. Communication - specifies how the project manager will communicate with project owners, participants and stakeholders throughout the project; and
 - h. Deliverables - documents what specific products, processes or services the project will provide upon completion.

3.0 The templates

3.1 Project plan

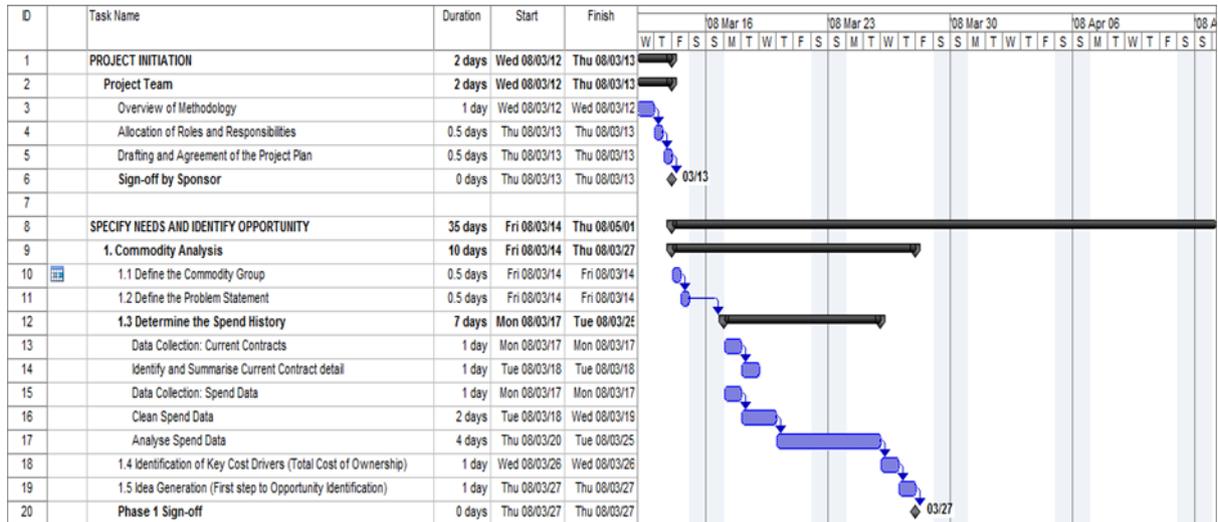


Table 2: Project plan

3.2 Project charter

Project Charter – <PROJECT NAME>	
Problem Statement	
Define the problem as clearly as possible	
What do you want to “fix”	
Project Background	
Project value (inclusive of taxes)	R
<i>(preferably with cost breakdown to understand the TCO & and cost drivers)</i>	
Purpose of the Project	Project Boundaries
Purpose tries to gauge the reason behind something that is being done.	In Scope
Purpose defines the reasoning behind doing a particular thing and what the team plans to achieve from it.	Clearly define the boundaries of the project
	Out of Scope

<p>For example: the Project's purpose is to ensure the project is delivered within budget, time and quality to achieve value for money. Further, to align with the community objectives.</p> <p>For example: the procurement of medical equipment will enhance service delivery and the effective functioning of the public health care system.</p>	
<p>Objectives of the project</p> <p>The term objective refers to set tasks or goals that the project wishes to accomplish.</p> <p>Objectives are more concrete and are clearly defined by certain steps that will eventually allow the project team to fulfil that particular goal.</p> <p>Objectives can be termed as small guidelines that help achieve the goal at hand</p>	<p>Anticipated Deliverables</p> <p>.....</p> <p>.....</p> <p>.....</p>
<p>Key milestones (timescales)</p> <p>.....</p>	<p>Risks/Issues</p> <p>.....</p>
<p>Monitoring & Reporting</p> <p>Progress Report for weekly/monthly feedback</p>	<p>Assumptions</p> <p>.....</p>
<p>Project Roles & Responsibilities</p>	
<p>Programme Manager</p> <p>Champion the project to stakeholders</p> <p>Remove roadblocks</p> <p>Monitor the progress of the project</p> <p>Consider and allocate resources to support the project (resources, budget)</p>	<p>Project Leader</p> <p>Understand & and communicate business needs and stakeholder requirements to teams</p> <p>Lead team to achieve goals and objectives of the project</p> <p>Ensure the project aligns with overall objectives</p> <p>Track the progress of the project</p> <p>Provide regular project feedback</p> <p>Resolve disputes</p>

Table 3: Project charter

3.3 Project Implementation Plan

Table 4 (implementation plan), indicates the time frame that the sourcing strategy will span. For example, other sourcing strategies may kick off in the previous fiscal year.

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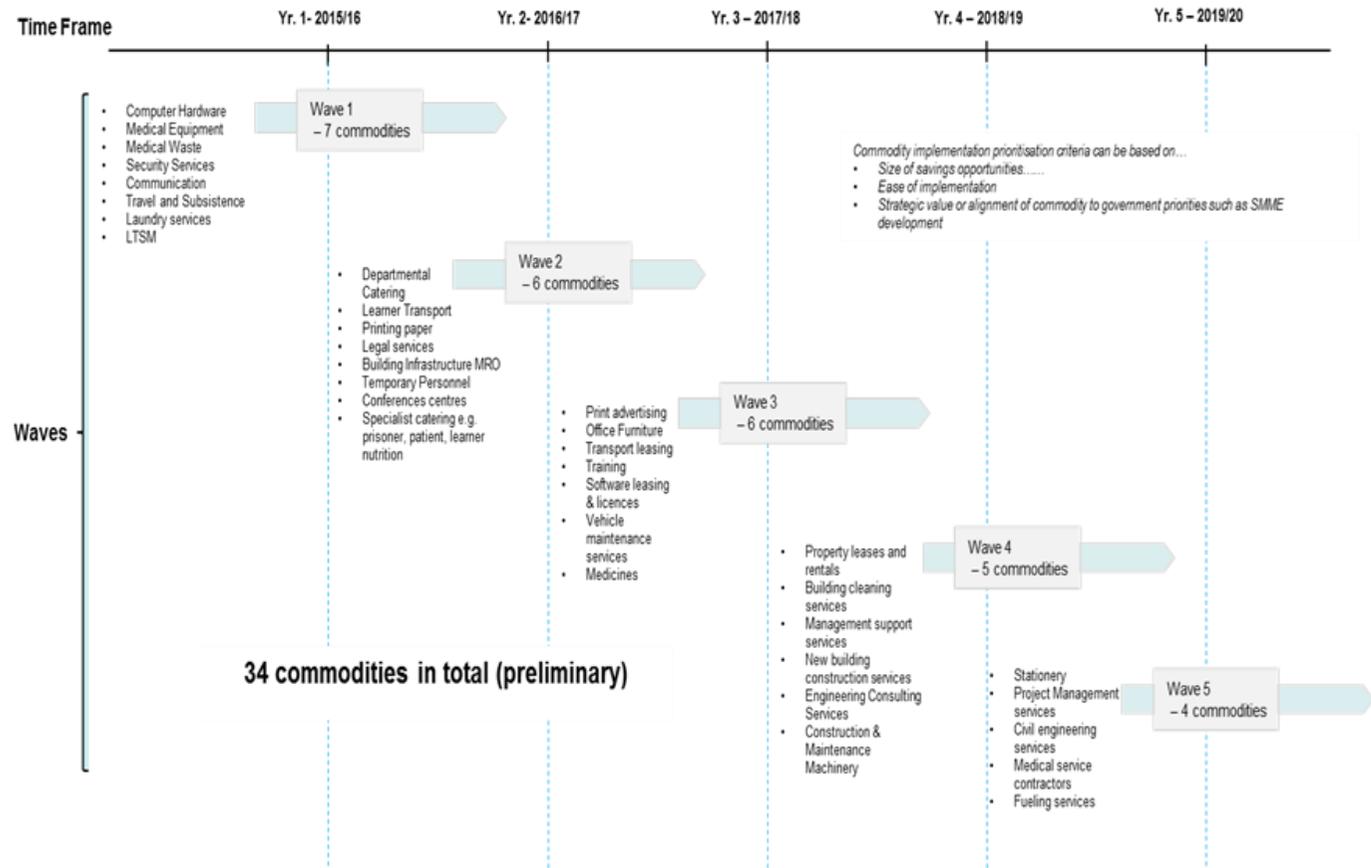


Table 4: Project implementation plan