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| Stage Plan Template & Guide  xxx Project |  |

This Guide should be read in conjunction with the template which follows. Accordingly, the Guide should be removed from the front of the document once complete.

**Purpose**

The Stage Plan is the detailed plan for a particular stage of a project. The Stage Plan for the first delivery stage of a project should be prepared and completed during project Initiation. Subsequent Stage Plans (if required) are prepared towards the end of the preceding stage.

The purpose of the Stage Plan is to provide sufficient management information to control the stage effectively. This means that the Plan should be used to ensure that all stakeholders agree that the work to be undertaken during the stage has been adequately planned. This will be critical to project success.

**What should a Stage Plan cover?**

The key areas that the Stage Plan should cover are:

* Details of the stage deliverables, including timing of and responsibilities for delivery
* Key prerequisites, dependencies, constraints and assumptions
* High-level stage timeline
* The key controls to be adopted in relation to the stage.

The information presented in the Stage Plan should be stage-specific. This means there is no need to repeat information already presented in the overarching Project Plan.

**Key considerations in developing the Plan**

It is important to remember that, like the Project Plan, the Stage Plan is not developed by the Project Manager in isolation. This requires consideration of three key factors:

1. The Plan should be developed with the close involvement of the Project Sponsor and those responsible for output delivery;
2. Where the work of the stage is to be undertaken by several teams acting independently, it may be useful for each team leader to develop a team plan (using this template) to describe their team’s involvement in the stage. The contents of these team plans would then be consolidated by the Project Manager into one Stage Plan.
3. The Plan should be developed with reference to other project documents and records (both for current and previous projects). These will include lessons learned from previous projects, and the project risk and issues registers.

Accordingly, the key considerations in the development of the Plan are:

* The Plan must be achievable. This means that estimates must be based on consultation with the staff who will undertake the work and/or reference to historical data
* The Plan should incorporate lessons from previous projects
* Management and control activities, as well as the activities to create the products in scope, should be considered.

**How to use this template**

*Individual project data*

The cover page of the template document contains individual project details. Please complete all of the fields on the first page. The details you insert will automatically populate the Project Title and Version fields in the document headers and footers.

**Text styles**

When using this template, please note that:

* italictext enclosed in angle brackets (eg <*text*>) is explanatory and is intended to be replaced by individual content.
* text in italics is also explanatory and provides a guide as to the kind of information that should be included in a particular section. It should be deleted as part of finalising the document.
* normal text should be retained in the document wherever possible.

**Template control**

The final page of the template which follows contains template control information. Please make sure that this page is deleted as part of finalising your individual document.

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| Stage Plan  xxx Project |  |
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| --- | --- | --- | --- |
| Project Name: | [Project Name] | | |
| Stage Title/Number: | **[Stage Title]** | | |
| Date: | [Date] | Version: | [Version] |
| Author: |  | | |
| Project Sponsor: |  | | |

**Revision History**

| Version | Revision Date | Summary of Changes | Sections Affected |
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**Approvals**

This document requires the following approvals: (A signed copy should be kept in the project files)

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1. Overview

*This section should provide an overview of the Stage, Stage Plan and the major activities to be undertaken. The following headings can be used to structure this information.*

* 1. Scope

<*In no more than two to three sentences, define what the stage is intended to accomplish. This statement of scope must be consistent with descriptions of this stage provided in the Project Plan*.>

* 1. Approach

<*Provide an overview of how and when stage objectives are to be achieved. This could include an overview of the major stage activities and products, how these contribute to project objectives, and key dates for completion.*>

1. Plan prerequisites

<*Describe what has to happen before this stage plan can be implemented. For example, the stage may require a completed product from another project. If there are no prerequisites, delete this section.*>

1. Key assumptions and constraints
   1. Assumptions

*<Where different to those provided in the overarching Project Plan, provide an overview of any key planning assumptions that have been made in the development of this Plan. For example, assumptions may have been made about the number of quality reviews or rework required for each deliverable; or it may be assumed that the information and resources needed to produce the deliverables of this stage are, in fact, available. If there are no stage-specific assumptions, delete this section.*>

* 1. Constraints

<*Where different to those provided in the overarching Project Plan, provide a summary of any known constraints on the stage. Constraints can relate to a variety of factors, including the order in which individual project activities must be completed, resources (eg a resource constraint may force parallel activities to be performed in sequence) or key operational factors (eg key University dates). Include details of any constraints which have been imposed on this stage by the project itself, such as deadlines. If there are no stage-specific constraints, delete this section.*>

1. Key dependencies

<*Detail the main dependencies of the stage with other organisations, projects, systems, authorities etc. For example, another project may need to deliver an output before work can commence on an output of this stage, an authority may be publishing a new set of regulations which will shape one or more of the outputs of this stage. As dependencies can also constitute key project risks, the project risk register should be reviewed when completing this section.*>

1. Key outputs/deliverables

*Using the following table provide a breakdown of project outputs, including the specific method by which the quality of each will be checked, the person responsible for delivery, and planned delivery date.*

*Depending on the complexity of the outputs and/or the work required to produce them, this information may need to be supplemented by a Work Breakdown Structure which splits the deliverables into activities and each activity into tasks. Generally, activities are not split into tasks of less than one day’s duration.*

| Deliverable | Method of Quality Checking | Person Responsible | Planned Date |
| --- | --- | --- | --- |
|  |  |  |  |
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1. Stage controls

*This section should describe the controls (including tolerances) that will be adopted to ensure the stage remains true to its objectives. The level of control will depend on the size, risk and complexity of the stage and the project. This should be carefully considered, as too many controls will overload the project manager with paperwork. Any or all of the following headings may be useful in structuring this section.*

* 1. Tolerances

<*State any tolerances that have been set for the stage. Although tolerances may have been set at project level (eg relating to time or budget), provide details of any stage-specific tolerances. Use the following table to structure this information.>*

| Control | Permitted Variance |
| --- | --- |
| <*eg Time*> | <*One week has been built into the plan*> |
| <*eg Cost*> | <*10% of total budget*> |

* 1. Monitoring & reporting

*The normal and exception monitoring and reporting processes articulated in the Project Plan will apply to each stage. There is no need to repeat them here. A simple cross-reference to the relevant section of the Project Plan will be sufficient.*

*However, where there are aspects of the stage that require specific control, include details in this section. For example, where the work of the stage is to be undertaken by several teams, this section would detail how the work of each will be monitored, and how the respective team leader(s) will control the work of his/her team.*

1. Related documents

<*Provide a list of documents related to and/or referenced in the Stage Plan and their location details. These include:*

* *Project Plan*
* *Project Schedule (Microsoft Project or Gantt chart)*
* *Risk Register*
* *Issues Register>*

1. High level timeline

<*Include a high level overview of the stage timeline. This may be graphically represented, such as through the use of a simple bar/Gantt chart. Alternatively, provide a link to an electronic copy of the Project or Stage timeline.*>

Template control

| Template Name | Version | Location |
| --- | --- | --- |
| Stage Plan Template | 0.1 | Document1 |

Template approvals

| Version | Name | Title | Signature/ Approval Method | Approval Date |
| --- | --- | --- | --- | --- |
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Template revision history

| Version | Date | Author | Reason | Sections |
| --- | --- | --- | --- | --- |
| 0.1 | 24/12/2013 | A Staff | Initial Draft | All |