#### Scope statement for [project/initiative]

*This document describes the work to be done to complete an approved project/initiative. If a project proposal is available, use it as a resource when developing this document.*

# General information

The table below provides general information about the service and primary resources involved project/initiative.

|  |  |
| --- | --- |
| **Project PM management resource** |  |
| **Primary operational resource** |  |
| **Other key operational resources**  |  |
| **Service owner (functional)** |  |
| **Service manager (technical)** |  |
| **Service(s) impacted** |  |

# Resources/Project team

*Indicate the resources that will be engaged in the project/initiative. List the members of the team.*

# Description

*Describe the project/initiative in as much detail as possible.*

# Objectives

*Describe the high-level objectives of the project/initiative.*

# Goals

*Describe the high-level goals of the project/initiative. Goals should be quantifiable and measurable.*

# Assumptions

*List the assumptions associated with the project/initiative.*

# Constraints

*If there are constraints on the project/initiative in terms of schedule, budgets, or resources, describe them here.*

# Exclusions

*Describe any specific activities the project/initiative will not address (i.e. are out of scope).*

# Risks

*List the risks associated with the project/initiative. For each risk, describe mitigation strategies that could be used to minimize the risk.*

# Costs

*Estimate the costs associated with the project/initiative, including all required resources (staff, hardware, software, facilities, etc.).*

# Deliverables

*List the documents and other deliverables that will be produced as part of the project/initiative. Identify the method(s) by which operational resources will approve each deliverable. For example, the team may decide that an operational manager will review and approve the communication plan.*

|  |  |  |
| --- | --- | --- |
| **Deliverable** | **Produced/maintained by** | **Approved by** |
| **Project plan** |  |  |
| **Communications plan** |  |  |
| **Status reports** |  |  |
| **Meeting notes** |  |  |
| **Other project documents** |  |  |

# Schedule

*Define the schedule for the project and its phases, if any.*

# Milestones

*Identify the milestones that correspond to the completion of an important deliverable or critical task.*

# Success Indicators

*Discuss the criteria that will determine whether the project/initiative is successful and who will make that determination.*

# Scope Change Management

*Describe the process for managing requests to change the scope throughout the project. Do suggested changes need to be documented or simply discussed with the project team? Who approves changes in scope?*

# Project/Initiative Closure, Transition to Operations

*Indicate how project/initiative closure will be determined, and how the project/initiative will transition to normal operations.*

# Distribution

*List the individuals with whom this document is being shared.*

Scope Change for [Project Name]

*Use this template to document a change in project scope. Submit the scope change to project sponsors.*

# Description

*Provide a description of the change in scope: what should now be considered in scope (or out of scope) for this project? Provide justification and enough background information so that approvers (sponsors) have enough information on which to base their decision.* *Using the appropriate sections below, describe the impact to the project.*

## Cost

*Has the cost increased (or decreased significantly) for the project? Explain.*

## Schedule

*Has the schedule been compressed or extended? Explain.*

## Deliverables

*Is there a new deliverable? Has a deliverable been eliminated? Explain.*

## Resources

*Are additional resources needed, or is a resource no longer needed or available? Explain.*

# Approval

*Name the approvers and describe the approval process. If the scope change is approved, distribute this document to the project team and retain it in the project document archives.*