

ORGANIZATION'S NAME

Scope Management Plan

Project Name:
Project Number:

Prepared By: Author's Name Here

Last Revised On: (Insert Date)

This scope management plan is a component of the project management plan. It describes how the project scope will be developed, defined, monitored, controlled and verified.

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SCOPE MANAGEMENT PLAN

MANAGEMENT APPROACH

The term “project scope” refers to the sum of all products, services and results that will be provided as the project.

The purpose of this scope management plan is to set forth the plans and procedures for defining, developing, monitoring, controlling, changing, implementing and verifying the project scope. It’s the intent of scope management to ensure the completion of all the work required, and only the work required, to complete the project successfully.

The project manager will assume overall responsibility for project scope management. The people listed below will assume the following scope management responsibilities:

Names / Roles	Responsibilities
Project Manager	
Project Sponsor	
Project Team Lead	
Project Team Members	

SCOPE DEVELOPMENT

SOURCES

The scope of this project is defined in the Scope Definition section, below. Development of the project scope began with an examination of the following sources:

- A. Project Charter
- B. Applicable codes, regulations, statutes and laws
- C. Stakeholders
- D.

COLLECT PROJECT REQUIREMENTS

The complete requirements gathering and definition process is described in the Requirements Management Plan and all known project requirements are set forth in the Requirements Traceability Matrix. The Requirements Traceability Matrix is included in the Requirements Management Plan.

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SCOPE DEFINITION

The project scope baseline is comprised of the project scope statement, the work breakdown structure and the WBS dictionary, below.

PROJECT SCOPE STATEMENT

The project scope statement is included below as Attachment A.

(For a free project scope statement template, see <http://www.mypmllc.com/project-management-resources/free-project-management-templates/scope-statement-template/>.)

WORK BREAKDOWN STRUCTURE (WBS)

The work breakdown structure (WBS) is included below as Attachment B.

(For a free work breakdown structure template, see <http://www.mypmllc.com/project-management-resources/free-project-management-templates/work-breakdown-structure/>.)

WBS DICTIONARY

The WBS dictionary is included below as Attachment C.

(For a free WBS Dictionary template, see <http://www.mypmllc.com/project-management-resources/free-project-management-templates/wbs-dictionary/>.)

SCOPE VALIDATION

Scope validation refers to the process of verifying and formalizing acceptance of the completed project deliverables. A list of the project deliverables can be found in the project scope statement, included below in Attachment A and in the Deliverables Acceptance and Rejection Log included as Attachment F.

SCOPE VERIFICATION

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Describe how the deliverables will be verified against the project scope. To whom will the deliverables be first presented for inspection and verification? Does the quality management plan address quality control processes? Are the control quality processes performed before scope validation or are those two processes performed in parallel?

Will anyone else be involved in verifying the deliverables? What are their roles?

When will scope verification be performed? How will the verification of deliverables be tracked?

WBS ID	WBS Name	Deliverable	Verified By	Variance	Notes

DELIVERABLES ACCEPTANCE

Describe the manner in which project deliverables will be formally presented and accepted. Will they be presented at the end of each phase? Will they be presented at regular intervals? Who will present the project deliverables and to whom will they be presented?

Name / Role	Responsibility
	Verifies the project deliverables
	Presents the project deliverables
	Reviews the project deliverables
	Accepts or rejects the project deliverables

ACCEPTED DELIVERABLES

Describe the process for accepting the project deliverables. Will the project deliverables become accepted in writing? Is a deliverable acceptance document in place?

Acceptance and rejection of project deliverables can be tracked below in Attachment F, Deliverables Acceptance and Rejection Log.

REJECTED DELIVERABLES

Describe the process for rejecting the project deliverables. What happens to rejected deliverables?

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Acceptance and rejection of project deliverables can be tracked below in Attachment F, Deliverables Acceptance and Rejection Log.

SCOPE CONTROL

Controlling project scope is the process of monitoring the status of the project scope and managing changes to the scope baseline.

MONITORING

Who is responsible for monitoring the project scope to ensure the project remains within the scope baseline? What processes will be used?

Name	Scope Monitoring Activities

WORK PERFORMANCE DATA

What work performance data will be captured? Who will track the number of change requests received? Who will track the number of deliverables completed?

VARIANCE ANALYSIS

Variance analysis is a technique used for determining the cause of any difference and the degree of any difference between the scope baseline and the actual performance. Describe the processes for performing variance analysis. When is corrective or preventative action required? Does the quality management plan speak to allowable variances?

INTEGRATED CHANGE CONTROL PROCEDURES

Use the sections below to describe the change control procedures for the project.

WRITTEN REQUESTS

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All requests for change must be submitted in writing, on the Change Request Form included below in Attachment D.

(For a Change Request template, see <http://www.mypmllc.com/project-management-resources/free-project-management-templates/change-request-template/>.)

A. Who May Submit Change Requests

The following people may initiate changes to the project scope:

1. Project sponsor
2. Project Manager
3. Project team members
4. Other project stakeholders

B. Deliver To

All written requests for changes must be submitted to the project manager who will log and track each request on the Change Request Log included below in Attachment E. (For a Change Request Log Template, see <http://www.mypmllc.com/project-management-resources/free-project-management-templates/change-request-log-template/>)

SIZING

The project manager and select project team members will analyze the change requests for impact to schedule, cost and quality. Once the sizing is complete, the project manager will electronically submit each change request to all members of the change control board.

CHANGE CONTROL BOARD

Members of the change control board will evaluate each change request and decide whether it becomes approved, approved with modifications, rejected or deferred. Once a decision is reached, the change request is signed and emailed to the project manager for planning revisions and implementation.

The following people are members of the change control board:

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Name	Role	Email

A. APPROVED

When a change request is approved, the project manager will track the approval on the change request log found in Attachment E, below. The project manager will also ensure implementation of the change, as it was submitted and approved.

Where implementation affects changes to the project management plan, the project manager will revise the plan and distribute notice of the revisions in accordance with the procedures set forth in the communication management plan.

B. APPROVED WITH MODIFICATIONS

When a change request is approved with modifications, the project manager will track the modified approval on the change request log found in Attachment E, below. The project manager will also ensure implementation of the change, as it is modified.

Where implementation affects changes to the project management plan, the project manager will revise the plan and distribute notice of the revisions in accordance with the procedures set forth in the communication management plan.

C. REJECTED

When a change request is rejected, the project manager will track the rejection on the change request log found in Attachment E, below and provide written notice of the rejection to the party who initiated the change. No further action will be taken.

D. DEFERRED

When a change request is deferred, the project manager will track the deferred request on the change request log found in Attachment E, below. The project manager will also notify the party who initiated the change request.

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No other action will be taken unless the change control board later approves, approves with modifications or rejects the change request.

ASSUMPTIONS

While defining and managing project scope, it's inevitable that assumptions will be made. All assumptions regarding project scope will be documented here then transferred to the Risk Management Plan for further management.

Assumption	Date Transferred to Risk Management Plan

ISSUES

While defining and managing project scope, it's inevitable that issues will be encountered. All issues regarding project scope will be documented here then transferred to the Risk Management Plan for further management.

Issues	Date Transferred to Risk Management Plan

RISKS

While defining and managing project scope, risk may be identified. All risks regarding project scope will be documented here then transferred to the Risk Management Plan for further management.

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Risks	Date Transferred to Risk Management Plan

PLAN APPROVAL

By signing below, I, _____ in my capacity as Project Sponsor approve of this Scope Management Plan.

Name:
Title:

Signature

Date Approved

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ATTACHMENTS

A. PROJECT SCOPE STATEMENT

Attach project scope statement here.

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B. WORK BREAKDOWNS STRUCTURE (WBS)

Attach the WBS here.

For additional project management templates visit www.mypmlc.com/project-management-resources/free-project-management-templates.

C. WBS DICTIONARY

Attach the WBS dictionary here.

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D. CHANGE REQUEST FORM

Attach the change request form here.

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E. CHANGE REQUEST LOG

Attach the change request log here.

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F. DELIVERABLES ACCEPTANCE AND REJECTION LOG

WBS ID	Deliverable	Reviewed By	Accepted or Rejected	Notes

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