PMdocs
Project Management Docs

SCHEDULE MANAGEMENT PLAN
<PROJECT NAME>

COMPANY NAME
STREET ADDRESS
CITY, STATE ZIP CODE

DATE

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INTRODUCTION

This section highlights the purpose and importance of the schedule management plan. It provides a general description of what should be included in the schedule management plan. These items will be described in more detail later in the plan under each corresponding section.

The project schedule is the roadmap for how the project will be executed. Schedules are an important part of any project as they provide the project team, sponsor, and stakeholders a picture of the project's status at any given time. The purpose of the schedule management plan is to define the approach the project team will use in creating the project schedule. This plan also includes how the team will monitor the project schedule and manage changes after the baseline schedule has been approved. This includes identifying, analyzing, documenting, prioritizing, approving or rejecting, and publishing all schedule-related changes.

SCHEDULE MANAGEMENT APPROACH

This section provides a general framework for the approach which will be taken to create the project schedule. This includes the scheduling tool/format, schedule milestones, and schedule development roles and responsibilities.

Project schedules will be created using MS Project 2007 starting with the deliverables identified in the project's Work Breakdown Structure (WBS). Activity definition will identify the specific work packages which must be performed to complete each deliverable. Activity sequencing will be used to determine the order of work packages and assign relationships between project activities. Activity duration estimating will be used to calculate the number of work periods required to complete work packages. Resource estimating will be used to assign resources to work packages in order to complete schedule development.

Once a preliminary schedule has been developed, it will be reviewed by the project team and any resources tentatively assigned to project tasks. The project team and resources must agree to the proposed work package assignments, durations, and schedule. Once this is achieved the project sponsor will review and approve the schedule and it will then be baselined.

The following will be designates as milestones for the project schedule:
- Completion of scope statement and WBS/WBS Dictionary
- Baselined project schedule
- Approval of final project budget
- Project kick-off
- Approval of roles and responsibilities
- Requirements definition approval
- Completion of data mapping/inventory
- Project implementation

- Acceptance of final deliverables

Roles and responsibilities for schedule development are as follows:

The project manager will be responsible for facilitating work package definition, sequencing, and estimating duration and resources with the project team. The project manager will also create the project schedule using MS Project 2007 and validate the schedule with the project team, stakeholders, and the project sponsor. The project manager will obtain schedule approval from the project sponsor and baseline the schedule.

The project team is responsible for participating in work package definition, sequencing, and duration and resource estimating. The project team will also review and validate the proposed schedule and perform assigned activities once the schedule is approved.

The project sponsor will participate in reviews of the proposed schedule and approve the final schedule before it is baselined.

The project stakeholders will participate in reviews of the proposed schedule and assist in its validation.

SCHEDULE CONTROL

This section defines how the project's schedule will be controlled throughout the life of the project. This includes the frequency of updates and schedule reviews as well as communicating the schedule and progress. This section also defines roles and responsibilities as they relate specifically to project schedule control.

The project schedule will be reviewed and updated as necessary on a bi-weekly basis with actual start, actual finish, and completion percentages which will be provided by task owners.

The project manager is responsible for holding bi-weekly schedule updates/reviews; determining impacts of schedule variances; submitting schedule change requests; and reporting schedule status in accordance with the project's communications plan.

The project team is responsible for participating in bi-weekly schedule updates/reviews; communicating any changes to actual start/finish dates to the project manager; and participating in schedule variance resolution activities as needed.

The project sponsor will maintain awareness of the project schedule status and review/approve any schedule change requests submitted by the project manager.

SCHEDULE CHANGES AND THRESHOLDS

As the project schedule is created it is important that boundary conditions are set by the project sponsor to establish the schedule parameters within which the project is expected to operate. Any event which may potentially cause a schedule change which exceeds these boundary conditions must have a schedule change request submitted and approved by the sponsor before the schedule change is made. For this example we will use a change threshold of 10%.

If any member of the project team determines that a change to the schedule is necessary, the project manager and team will meet to review and evaluate the change. The project manager and project team must determine which tasks will be impacted, variance as a result of the potential change, and any alternatives or variance resolution activities they may employ to see how they would affect the scope, schedule, and resources. If, after this evaluation is complete, the project manager determines that any change will exceed the established boundary conditions, then a schedule change request must be submitted.

Submittal of a schedule change request to the project sponsor for approval is required if either of the two following conditions is true:
- The proposed change is estimated to reduce the duration of an individual work package by 10% or more, or increase the duration of an individual work package by 10% or more.
- The change is estimated to reduce the duration of the overall baseline schedule by 10% or more, or increase the duration of the overall baseline schedule by 10% or more.

Any change requests that do not meet these thresholds may be submitted to the project manager for approval.

Once the change request has been reviewed and approved the project manager is responsible for adjusting the schedule and communicating all changes and impacts to the project team, project sponsor, and stakeholders. The project manager must also ensure that all change requests are archived in the project records repository.

SCOPE CHANGE

Occasionally, approved changes to the project's scope may result in the schedule needing to be re-baselined. These scope changes may include new deliverables or requirements that were not previously considered as part of the original schedule's development. In these situations the project manager and team must consider the current status of the project schedule and how the scope change will affect the schedule and its resources as the project moves forward.

Any changes in the project scope, which have been approved by the project sponsor, will require the project team to evaluate the effect of the scope change on the current schedule. If the project manager determines that the scope change will significantly affect the current project schedule, he/she may request that the schedule be re-baselined in consideration of any changes which need

to be made as part of the new project scope. The project sponsor must review and approve this request before the schedule can be re-baselined.

SPONSOR ACCEPTANCE

Approved by the Project Sponsor:

_____   Date: _____

<Project Sponsor>
<Project Sponsor Title>

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