Project Framework

Using the selected RFP and your team – answer the questions outline below. Normally a full proposal would be needed to submitted and upon submission, be reviewed against the criteria in the RFP. In lieu of a proposal, please answer the project framework questions.
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<u>IMPORTANT NOTE</u>*: Many of these items will help with development of your Project Charter as well as other project artifacts. At this point, be as descriptive as possible knowing that you will continue to gather information and further define as you learn or discover more. You may need to ask questions, probe for answers, and do some research as your develop the framework and project charter.* ***Be concise - - meaning thorough, yet brief. Three to four pages is adequate including headings. MAKE All ASSUMPTIONS AS NEEDED.***

1. **<u>Your Team</u>**: Provide your team information including name, team members, and why you chose this focus or RFP.

2. **<u>Customer</u>**: Who is requesting the project? Give details on the company/organization, groups, departments, programs, individuals, or others "buying" your services.

3. **<u>Stakeholders</u>**: List out the known stakeholders including individuals and/or groups.

4. **<u>Problem Statement</u>**: What issue or need is being addressed? Is this an opportunity for the requesting organization or a way to address a challenge? Be as descriptive as possible. Remember, make assumptions as needed.

5. **<u>Project Statement</u>**: High level statement that defines the boundaries of the project. It is essentially a "goal" and generally has three elements: (1) a time element, (2) a cost element (usually based upon the given budget or a rough order of magnitude estimate), and (3) a performance element. (quality/requirements).

6. **<u>Measurable Objectives</u>**: Outcome-focused singular statements (only one topic/focus per statement) that are performance-based, address all major project requirements/constraints, and can be measured against a standard of completion or success. Use the S.M.A.R.T. criteria.

7. **<u>Statement of Work (SOW) – Essentially a "Preliminary Scope Statement"</u>**: Covers the preliminary scope of the project. At this point, this would be fairly high level since many details may not have been progressively elaborated yet. This statement will outline the major tasks or work elements required by the customer. For example, if you are developing a website, would you also develop the content for the website? How about programming or coding - - would that be a part of the scope OR are you using an "off-the-shelf" product? Will you be hosting the website? Try to capture the scope at this point as much as possible. Don't forget to also list any "exclusions" or things NOT included in the scope. If the customer is going to handle certain parts of the project or supply any items, supplies, equipment, or materials then list those out.

8. **<u>Customer Requirements</u>**: Gather as many customer requirements as possible including specifications, attributes, or performance. Consider standards, level of "quality" as the

customer defines it, and any codes or regulations that must be adhered to. You may need to make some more assumptions here.

9. **Major Deliverables and Final Product**: What does the customer expect you to deliver? What is the final product, service, or result of this project? List these out. Managing customer expectations begins here.

10. **Acceptance Criteria**: What criteria will the customer use to determine if the deliverables including the final product are completed to the customer's expectations? RFPs generally state these

11. **Initial Assumptions-Constraints-Issues**: List out any assumptions (assumed to be true without verification - low level risk), constraints (define and confine the project), and issues (happening right now and need to be considered and/or addressed).

12. **Risks**: List out the high level risks. Do not try to complete a full blown risk assessment since we will do this later when you have more information. Don't forget to address both positive risk (opportunities) and negative risks (threats).

13. **Major Milestones / Timeline**: At this point, you probably only know a general timeframe. Create or list a time line with major milestones (points in time when important events occur, deadlines are scheduled, or deliverables are completed). Make sure you list the final completion date, which you should have already determined when developing your "project statement" and "constraints."

14. **Contact Information**: List out any points of contact for the customer and stakeholders.

15. **Approach/Solution**:

    a) **Technical Section**: Give a general account (using details you do know) of how you plan to address the issue or need for the customer(s) from a technical perspective. Include how items such as info/data collection and analysis, alternative (Plan 'B') approaches to the need/issue, rationale for your chosen approach, a brief explanation of how your approach will meet the requirements. Discuss any technologies you plan to use. If there are any exceptions to meeting any particular customer requirements (for whatever reason), then state this also along with the reason you cannot meet the requirement.

    b) **Management Section**: Briefly describe how you plan to manage this project - - will you be on site OR will you work virtually from your office OR a combination? Describe the processes you plan to use (waterfall, agile, traditional, etc.), and if you plan to do everything in-house or subcontract (if known at this time).

    c) **Cost Section**: If you have any early cost estimates (not just the budget you were given), then list those here. At this point, these will most likely be very high level estimates (top down). Recall that high level estimates can be determined using techniques such as analogous estimating, parametric estimating, or even several other methods that use comparisons, history, similarities, and previous experience. You may or may not know this information, but attempt to make a determination. Don't forget to include any

contingencies when giving an estimate (basically the bid amount you would give a customer if you were responding to an RFP with a proposal).

16. **<u>Benefits</u>**: Justify the value of your approach and team. Is there some innovative way you are looking to address the situation or a unique method that provides any added value? Does your team have experience or backgrounds in the field/industry?