Project Code – Project Name

Project Brief

Document Sign-off

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Date signed off</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Sponsor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Owner</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Project Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Programme Manager</td>
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</tr>
</tbody>
</table>

Working draft should be version 0.x and 1.x
Draft sent for Approval/Review should be version 2.x
Approved Project brief should be 3.0
Post-approval changes should be change controlled via Issue Log and Scope Change Page, and version 3.x

Background

Background to the project.

Scope

Project scope.

Changes to Scope will be logged on the Issue Log and also recorded on the Project Scope Change page.

Out of Scope

Any significant work we need to explicitly state we are not doing (that some stakeholders may assume or expect that we will).

Objectives and Deliverables and Success Criteria

Summarise - What we are aiming to do and deliver, by when.
What are we aiming to ultimately deliver that will be key to the measure of the success of this project - but potentially any significant other things along the way (that may outlive the project).

What are our objectives and what deliverables are part of them.

Driven by the Deliverables and Objectives. Do we have objective measures that we can point to to say the project has been a success (typically we said we would deliver X and we have).

Unless otherwise indicated, the deliverables are a success when accepted by the Project Sponsor and the Service Owner.

<table>
<thead>
<tr>
<th>Objective 1</th>
<th>Description of the Deliverables needed to achieve the objective</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliverable D1.1</td>
<td></td>
</tr>
<tr>
<td>Deliverable D1.2</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Objective 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliverable D2.1</td>
</tr>
<tr>
<td>Deliverable D2.2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Objective 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliverable D3.1</td>
</tr>
<tr>
<td>Deliverable D3.2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Objective 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliverable D4.1</td>
</tr>
<tr>
<td>Deliverable D4.2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Objective 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliverable D5.1</td>
</tr>
<tr>
<td>Deliverable D5.2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Objective 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deliverable D6.1</td>
</tr>
<tr>
<td>Deliverable D6.2</td>
</tr>
</tbody>
</table>

This table can be used through Business and Technical Analysis, Design, Build, and Testing/UAT as a Traceability Matrix to ensure the project brief project objectives and deliverables are followed through.

Requirements

State the known requirements that drive the project.
Who has set this requirement (who owns the requirement).
Ideally we set these as MoSCoW:
MUST - we would see the project as failing totally or partially if these are not achieved
SHOULD - we have a high expectation that these will be doable with planned work and budget - but if necessary these can be descoped
COULD - if all goes very well, these might be possible
WON'T - we want to be explicit about certain things that people might expect us to deliver but we want to be clear we won't deliver

Which deliverables will fully or partially satisfy the requirement?

Requirements are aligned with objectives and deliverables, and also the opportunity to realise the benefits.

<table>
<thead>
<tr>
<th>Requirement</th>
<th>User/Owner</th>
<th>MoSCoW</th>
<th>Set By</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requirement 1</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Requirement 2</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Requirement 3</td>
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<td></td>
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<tr>
<td>Requirement 4</td>
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<td></td>
</tr>
<tr>
<td>Requirement 5</td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Benefits

The benefits that the deliverables will enable or act as a catalyst in making happen. These benefits may be immediate or may be realised after the project has closed.

1. XXXXXXXXXXX
2. XXXXXXXXXXX
3. XXXXXXXXXXX
4. XXXXXXXXXXX
5. XXXXXXXXXXX

Governance

Project will have these governance roles by default. Delete/Add/Change as appropriate.

**Portfolio Governance**

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Division / Group / Team / College / School and Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Sponsor</td>
<td></td>
<td></td>
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<tr>
<td>Programme Owner</td>
<td></td>
<td></td>
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<tr>
<td>Programme Manager</td>
<td></td>
<td></td>
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<tr>
<td>Portfolio Owner</td>
<td></td>
<td></td>
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<tr>
<td>Portfolio Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Owner</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Project Board**

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Division / Group / Team / College / School and Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Sponsor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Senior User</td>
<td>Can be Sponsor</td>
<td></td>
</tr>
<tr>
<td>Senior Supplier</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other Board Members</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Tolerances

For medium and large projects, state any tolerances for budget/timeline/scope beyond which point the Project Manager must request approval of the change from the Sponsor and/or the Board. For all projects, check if there is a tolerance on budget/timeline/quality for escalating to programme/portfolio manager.

Resources Skills and Cost

Budget

For small projects and project teams, state the estimated effort - build and test, project management.
For medium and large projects, an estimate can be added to the Estimation Log and revised as project progresses.
Also estimate costs of hardware, software, licenses, travel, other.

Priority and Funding

Check the Forward Look and Annual Plan on ITI Sharepoint to see the project's priority within programme and portfolio (and reflect this also on the project info section of the website). Confirm that we have funding for this project.

Project Team

The project team: who manages the team, lead and other technical people, business analysts, lead and other representatives, people in other areas of the University who will be involved in analysis, testing, acceptance and service handover.

<table>
<thead>
<tr>
<th>Role</th>
<th>Name</th>
<th>Division / Group / Team / College / School and Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Manager</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Solution Architect</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Solution Development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Testing, Contributor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service Development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communications Assistance</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Quality of Project and Deliverables / Key Project Milestones

The milestones are a key tool in ensuring that the project process itself is followed as set out by ITI, and that the product deliverables are to the required Quality.

Edit this template to list the key Milestones and who signs off on these milestones. Add milestones for Security, Accessibility, UX, as required.

For medium and large projects, a project plan - MS Project, Gantt, or other - can be added to the Plan Log and revised as project progresses. The approach can be stated here.

You can also mention the approach the project is taking to set, measure and confirm the quality of the deliverables.

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Sign-Off means</th>
<th>Date of Milestone</th>
<th>Who signs-off (Accountability)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start of Project</td>
<td>Project can begin, is in line with Programme and Portfolio priority, has resource</td>
<td>13 Mar</td>
<td>Sponsor, Programme Manager</td>
</tr>
<tr>
<td>End of Planning</td>
<td>Project can begin, is in line with Programme and Portfolio priority, has resource</td>
<td>13 Mar</td>
<td>Sponsor, Programme Manager</td>
</tr>
<tr>
<td>XXXX</td>
<td>XXXX</td>
<td>XXXX</td>
<td>XXXX</td>
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<tr>
<td>XXXX</td>
<td>XXXX</td>
<td>XXXX</td>
<td>XXXX</td>
</tr>
<tr>
<td>Delivery</td>
<td>Change to Service can proceed</td>
<td>15 Jul</td>
<td>Sponsor, PM service owner/ service operations manager (helpline)</td>
</tr>
<tr>
<td>Handover to Support</td>
<td>support can take over running of the Service</td>
<td></td>
<td>service owner/ service operations manager (helpline)</td>
</tr>
<tr>
<td>Closure</td>
<td>Project can close</td>
<td>28 Jul</td>
<td>Sponsor, PM</td>
</tr>
</tbody>
</table>

Other Milestones as Appropriate

<table>
<thead>
<tr>
<th>Milestone</th>
<th>quality and completeness of analysis</th>
<th>business analyst / business lead / senior user / PM</th>
</tr>
</thead>
<tbody>
<tr>
<td>End of Analysis</td>
<td>quality and completeness of analysis</td>
<td>business analyst / business lead / senior user / PM</td>
</tr>
<tr>
<td>End of Design</td>
<td>quality and completeness of design</td>
<td>technical lead / senior supplier/ business lead / senior user/ PM</td>
</tr>
</tbody>
</table>
End of UI Design

quality of UI - to show we have designed an interface that is usable, accessible, promotes equality and diversity

technical lead / senior supplier / business lead / senior user

End of Build

quality and completeness of build

technical lead / senior supplier / PM

Acceptance

overall quality of deliverable, UAT has been passed, Integration testing successful, all components technically checked - fit for delivery to live service

technical lead / senior supplier / business lead / senior user / business analyst / PM

Security QA

satisfies security

Section Head

Branding QA

for new, upgraded services, sign-off that branding guidelines for ISG, University, school/college has been followed by the project team

PM / and as appropriate ... UoE C&M, college C&M and (pending) ISG Branding Team

Design UI QA

to show we have built an interface that is usable, accessible, promotes equality and diversity

Sponsor and Service Owner

EqIA

For new services or services undergoing substantial change, there must be an Equality Impact Assessment completed, validated by equality office and deposited on eqia website

PM / Service Owner / Equality Officer

GDPR / PIA

Check if your project needs to undergo a Privacy Impact Assessment

PM / Service Owner / CISO

GoCAB

Set the appropriate date for informing GoCAB of the release/change to service

PM

Assumptions

What are the key underlying assumptions for the project that underpin the planning? For example, that the requirements we have outlined are complete, that all our stakeholders have been identified, that the software we are using is ready and configured, that we have a ready to use TEST environment.

Constraints

Are there constraints on this project? For example, specialist skills are needed, having to deliver in certain windows through the academic year, we need to share a TEST environment with other developers?
Risks
The project manager will ensure that the project team will review the risk log at every team meeting, and project owners update their risks at least once a month or more as appropriate to the project.

Issues
The project manager will ensure all changes to cost/timeline/scope must be recorded in the issue log, and reflected in milestones log, budget and estimations, and the project Scope Change log.

Previous Lessons Learned
Does the ITI Lessons Learned (see ITI Projects Sharepoint) indicate any issues or risks from previous projects? Is any other previous experience pertinent?

Dependencies
Are there other projects or work that this project is dependent on to start or possibly interact with at a later stage - or vice-versa that depend on this project.

Are we depending on certain events to take place?

Are we dependent on suppliers, or product releases?

Communication
For projects with an array of external stakeholders, a Communication Plan can be created and made available on the ITI Sharepoint space if preferred.

Also confirm that:

Project Sponsor and Project Manager meeting schedule has been agreed with Sponsor.

Project Team meetings schedule has been arranged (these may be combined with Sponsor meetings).

Check the ITI Forward Look on ITI Sharepoint to see the level of engagement our partners expect for your project.

Check the ITI Forward Look to see if your project will be using the Major Governance Toolkit.
Run / Grow / Transform

Which activity does the project contribute to? The project could be one or more of R/G/T

Alignment with Strategic Vision

This project will deliver benefits, change and innovations in alignment with the IS Strategic Vision and the University’s Strategic Vision for 2025. ** Check the Annual Plan on ITI Sharepoint to see how the project’s deliverables and benefits have been aligned to Run/Grow/Transform and the Strategic Themes **

<table>
<thead>
<tr>
<th>Student Experience</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student experience and the unique Edinburgh offer</td>
<td></td>
</tr>
<tr>
<td>Online and distance learning leaders</td>
<td></td>
</tr>
<tr>
<td>Library national and international leadership</td>
<td></td>
</tr>
<tr>
<td>Research and Innovation</td>
<td></td>
</tr>
<tr>
<td>Research IT and Data Sciences</td>
<td></td>
</tr>
<tr>
<td>Innovation</td>
<td></td>
</tr>
<tr>
<td>Collaborative leadership and social responsibility</td>
<td></td>
</tr>
<tr>
<td>Service Excellence</td>
<td></td>
</tr>
<tr>
<td>Process improvement, efficiency, quality and best practice</td>
<td></td>
</tr>
<tr>
<td>Long-term IS strategic planning and linked professional services</td>
<td></td>
</tr>
<tr>
<td>Information Security</td>
<td></td>
</tr>
</tbody>
</table>

University’s Strategic Vision for 2025 the main elements of the vision that this projects contributes have a commentary.

<table>
<thead>
<tr>
<th>Vision Themes</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>A unique Edinburgh offer for all of our students</td>
<td></td>
</tr>
<tr>
<td>all of our undergraduates developed as student/researchers with clear, supported pathways through to Masters and PhD</td>
<td></td>
</tr>
<tr>
<td>all our students offered the opportunity to draw from deep expertise outside their core discipline</td>
<td></td>
</tr>
<tr>
<td>a highly satisfied student body with a strong sense of community.</td>
<td></td>
</tr>
<tr>
<td>Strong and vibrant communities within and beyond the University – making the most of our unique offer of world-leading thinking and learning within one of the world’s most attractive cities</td>
<td></td>
</tr>
<tr>
<td>Strong and vibrant communities within and beyond the University – making the most of our unique offer of world-leading thinking and learning within one of the world’s most attractive cities</td>
<td></td>
</tr>
<tr>
<td>A larger, more international staff who feel valued and supported in a University that is a great and collegial place to work, develop and progress</td>
<td></td>
</tr>
</tbody>
</table>
More postgraduate students – underpinned by the best support in the sector to ensure we attract the brightest and best regardless of ability to pay

A strong culture of philanthropic support focussed especially on our students and on outstanding research capabilities.

Many more students benefiting from the Edinburgh experience (largely or entirely) in their own country – supported by deep international partnerships and world-leading online distance learning

Sustained world leading reputation for the breadth, depth and interdisciplinary of our research supported by strong growth in research funding and strong international partnerships – drawing from well-established and less well developed sources

An estate that matches expectations, responds flexibly to changing student and staff needs, and showcases the University

A deeper and earlier collaboration with industry, the public sector and the third sector – in terms of research; knowledge exchange; and in giving our students the best possible set of skills for their future

<table>
<thead>
<tr>
<th>Digital Transformation</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Describe how the changes this project delivers will contribute to the digital transformation of the Service</td>
<td></td>
</tr>
</tbody>
</table>

**IS Change Programme - How will this project's Deliverables and Benefits promote the Themes**

*Indicate if the project deliverables and benefits contribute to the themes with the IS Change Programme.*

<table>
<thead>
<tr>
<th>IS Change Programme Theme</th>
<th>How the project deliverables and benefits contribute to change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Management</td>
<td></td>
</tr>
<tr>
<td>Working Together</td>
<td></td>
</tr>
<tr>
<td>Standards and Technical Leadership</td>
<td></td>
</tr>
<tr>
<td>Staff Learning and Development</td>
<td></td>
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<tr>
<td>Service Based Culture</td>
<td></td>
</tr>
<tr>
<td>Equality and Diversity</td>
<td></td>
</tr>
<tr>
<td>Partnerships and Philanthropy</td>
<td></td>
</tr>
<tr>
<td>Flexible Resourcing</td>
<td></td>
</tr>
<tr>
<td>Communication and Branding</td>
<td></td>
</tr>
</tbody>
</table>
Service Excellence - Information and Security

Are we using standard builds for the project (that is, pre-validated security controls will be in place for infrastructure and data)? Or do we anticipate having to develop non-standard infrastructure?

Will we have third party integrations on installations?

Are we dealing with data outwith our standard set of controls?

If so, what level of risk is associated with the data? What are the appropriate controls?

The project must outline how it is dealing with risk, how the need to design/build/test impacts on project scope, budget and timeline.

Confirm which University or divisional polices are providing guidance here.

Set security design, execution and acceptance as a deliverable quality assurance.

Create a security milestone for delivery - and design, build and acceptance depending on project complexity - that must be signed-off by project manager and section head.

Create any specific risks around security.

Service Excellence - Process Improvement, efficiency, quality and best practice (Social Responsibility and Sustainability)

If the project could or will lead to recycling of hardware then create a milestone called 'Recycle - Engagement' so that the project can engage with the Department for Social Responsibility and Sustainability at the appropriate time.

Add a benefit to the ITI Benefits Management and Realisation log (ITI Projects Sharepoint).

Is there an opportunity to take advantage of the Green IT Initiative for further funding?

Otherwise set as Not Applicable.

Digital Transformation

Indicate if and how the project itself is contributing to Digital Transformation.

Will it use available resources or funding specific to the initiative? E.g. using the services of the ISG Usability Team, applying for Digital Transformation funding.

Are we using new techniques or tools or processes in this project that can be used to transform how we work in general?
IS Change Programme - How will the execution of this project promote the Themes

*Indicate if the project itself (during plan, execution, implementation) contributes to the themes with the IS Change Programme.*

See the Guidance on the IT1001 Project Brief Template

<table>
<thead>
<tr>
<th>IS Change Programme Theme</th>
<th>How the project process will contribute to change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Management</td>
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<td>Communication and Branding</td>
<td></td>
</tr>
</tbody>
</table>

**Project Sponsor – Project Responsibilities**

The sign-off milestones are associated with specific responsibilities of the Sponsor role.

This sets out the Sponsor responsibilities on this project - please review and amend as appropriate for this project and agree with Sponsor

**Start of project – Explicitly Included in the Initiation Milestones Sign-Off**

1. Negotiates and confirms funding for the project
2. Ensures the project is in line with organisational strategy and priorities
3. Chairs the project board, appoints its members and ensures they are effective
4. Advises the project manager of protocols, political risks, issues and sensitivities
5. Makes the project visible within the organisation

**End of Planning – Explicitly Included in the Planning Milestone Sign-Off**

1. Works with the project manager to develop the Project Brief
2. Ensures a realistic project plan is produced
3. Sets tolerance levels for escalation to themselves and to the project board
4. Ensures that project team have representation and engagement from users and suppliers
5. Helps identify Stakeholders
6. Approves Communication Plan
7. Agrees on frequency of meetings with Project Manager
8. Agrees of frequency of meetings with Project Team
9. Agrees on milestones and who signs-off

**Development / Execution – ongoing**
1. Provides strategic direction and guidance to the project manager as directed by the Board
2. Approves changes to plans, priorities, deliverables, schedule
3. Encourages stakeholder involvement and maintains their ongoing commitment
4. Chief risk taker
5. Makes go/no-go decisions
6. Communicates change in organisational structure, priorities, business benefits or funding
7. Helps the project manager in conflict resolution
8. Helps resolve inter project boundary issues
9. Gains agreement among stakeholders when differences of opinion occur
10. Assists the project by exerting organisational authority and the ability to influence

Delivery – Explicitly Included in the Delivery Sign-Off
1. Ensures that Service is ready for change

Closure - Explicitly Included in the Closure Milestone Sign-Off
1. Helps with publicity for the change delivered
2. Ensure that benefits will be managed, measured and realised post-project
3. Evaluates the project’s success upon completion