A USER GUIDE FOR RESEARCHERS: PROJECT SCOPE TEMPLATES

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Research Project Management
https://research-tools.mun.ca/rpm

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INTRODUCTION

As part of the Project Management services offered at Memorial University of Newfoundland, Project Management resource packages, consisting of tools and templates, have been designed to aid researchers in the management of research project activities.

This user guide focuses on the Project Scope Templates. The scope templates are of value when planning the scope of a research project and also when monitoring and controlling its progress.

Note: Project management definitions outlined within this guide are reference from the Project Management Institutes, Project Management Body of Knowledge, Fifth edition.

INTRODUCTION

The Scope template is a Microsoft Office Excel file which consists of 4 tabs:

1. Instructions
2. Scope Statement Template
3. Activity List Template
4. Glossary of Terms
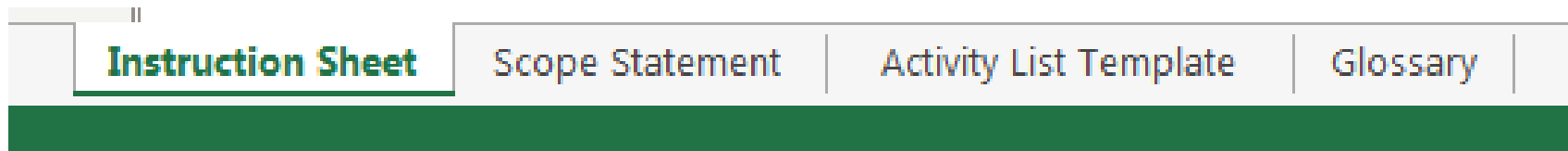
INSTRUCTIONS TAB

- Brief instructions are provided in this tab to provide the user a high level overview of the templates.

- For more detailed guidance on the use of these templates, users are encouraged to review the User Guide.

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| Instruction Sheet | **Scope Statement** | Activity List Template | Glossary |

## What is a Project Scope Statement?

The purpose of the Project Scope Statement is to provide a baseline understanding of the scope of a project. The project scope defines all of the work, and only the required work, to complete the project objectives. The Project Scope Statement is a high level overview of the research project that can be used for communication purposes.

SCOPE STATEMENT TEMPLATE

- The Scope Statement Template has an project identifier field which consists of 4 rows.
- Once these identifiers are entered they will automatically populate within the Activity List Template
- An approval field is available to document when the project scope was approved by a sponsor and any associated amendment dates to that scope.

Research Project Name:	
Principal Investigator:	
Project Manager (If Applicable):	
Project Start Date:	
Project End Date:	

Approved:	
Date:	
Version:	
Amendment:	

SCOPE STATEMENT TEMPLATE

- The Project Scope field contains a number of elements that allows a high level overview of the project scope.

- *Project Scope Elements* consists of:
    - Project Description
    - Objectives and Deliverables
    - Project Exclusions
    - Constraints and Dependencies
    - Assumptions
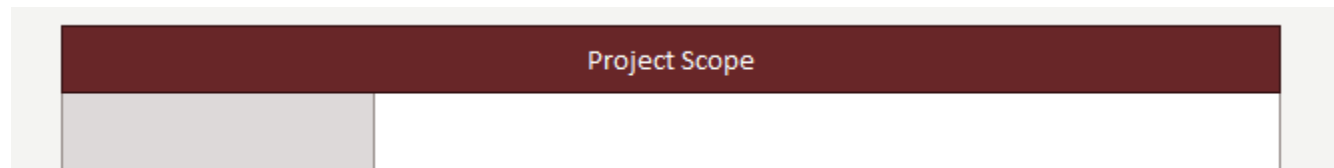
Project Scope

SCOPE STATEMENT TEMPLATE

Project Scope	
Project Description	
Objectives and Deliverables	
Project Exclusions	
Constraints/Dependencies	
Assumptions	

The *Project Description* is a brief, high level overview of the project. It should include the purpose of the project and justify the linkage to the mandate of relevant funding sponsors. Also, if applicable, any business linkages should be identified.

Based on the overall purpose of the research project, project *Objectives* can be identified. Project objectives summarize what is planned to be achieved through the project.

Furthermore, depending on the nature of the research project and the funding sponsor, the project may have associated *Deliverables* that can be identified here. A Project deliverable is a tangible or intangible product or service that is intended to be delivered to a project sponsor or client. This could be a report, developed technology, or any other aspect of a research outcome.

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Project Scope	
Project Description	
Objectives and Deliverables	
Project Exclusions	
Constraints/Dependencies	
Assumptions	

When documenting the scope of a research project, it may be just as important to identify what is not part of the project scope as what is.

- *Project Exclusions* are those things that are outside of the project boundaries and will not be included in the project work. It is often important to identify any project exclusions at the beginning of a research project to set expectations with project stakeholders and to prevent scope creep throughout the project.

- A *Project Constraint* is any restriction that defines a projects limitations. For example, certain activities within a research project may be time or season dependent. Thus some project activities may constrained based on the time of year.

- *Project Dependencies* are the relationships between aspects of the project work, or between aspects of the project work and external project factors. For example, some project activities may be dependent of the receipt of ethics, animal care, or regulatory compliance approval. Also, some project activities may be dependent on the completion of preceding project activities.

SCOPE STATEMENT TEMPLATE

| Project Scope	
Project Description	
Objectives and Deliverables	
Project Exclusions	
Constraints/Dependencies	
Assumptions	

Identifying project **Constraints** and **Dependencies** when planning project scope is important because it will aid in the subsequent scheduling of project activities.

Project Assumptions are those things that are believed to be true within a project. For example, when planning project activities certain activities may be dependent on the successful completion of preceding research activities. When planning research activities it is assumed that research outputs will allow for you to continue with your project plan.

Identifying these project assumptions during project planning is important as these assumptions will form the basis for the project risks that exist within the project.

SCOPE STATEMENT TEMPLATE

- If known, project funding details, including total project budget, funding sponsors, and project start and end dates can be identified as part of the project scope statement.

Project Budget (Total Including In-Kind)	
Funding Source(s)	
Start Date	
End Date	

ACTIVITY LIST TEMPLATE

| Instruction Sheet | Scope Statement | **Activity List Template** | Glossary |
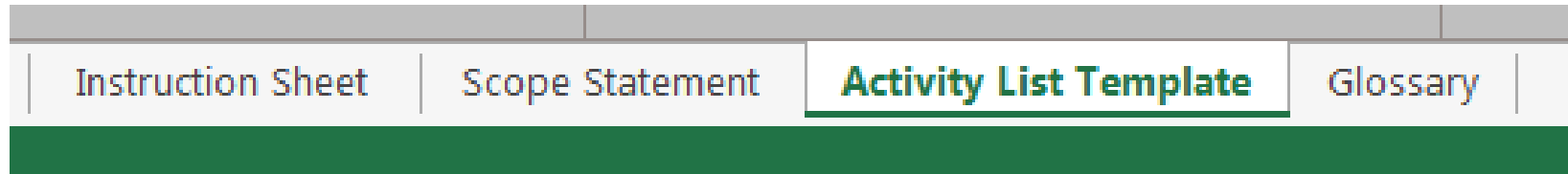
- The Activity list template can be used by researchers to breakdown their project into specific objectives and the associated activities/tasks required to complete their project.

- When the list is completed it will represent the *Work Breakdown Structure*, or the WBS for the project. A WBS is a breakdown of the project scope into hierarchical work packages, or all the activities that the project will take.

ACTIVITY LIST TEMPLATE

Objective / Activity / Task	Name	Detailed Description
1		
1.1		
1.2		
1.2.1		
1.2.2		
1.2.3		
2		
2.1		
2.2		
2.3		

Numerical Coding is used in this template to identify objectives, activities, and tasks. For example:

1 - Represents an **identified project objective** (displayed in grey)
**1.1** - Represents an **activity** associated with that objective (displayed in white)
1.1.1 - Represents a **task** associated with that activity (displayed in red)

- Breaking down the project scope into smaller work packages aids in the scheduling, budgeting, and monitoring of project work.

- Please note that objectives may have many associated project activities, and an activity may have many associated tasks.

ACTIVITY LIST TEMPLATE

Objective / Activity / Task	Name	Detailed Description
1		
1.1		
1.2		
1.2.1		
1.2.2		
1.2.3		
2		
2.1		
2.2		
2.3		

- The *Name* field is where the short title of the objective/activity/task is identified.

- The *Detailed Description* column provides a space for description of the work associated with each objective/activity/task to be qualified.

- A hierarchical *Detailed Description* of project objectives, activities, and tasks can aid in communicating project work within a project team and with a project sponsor.

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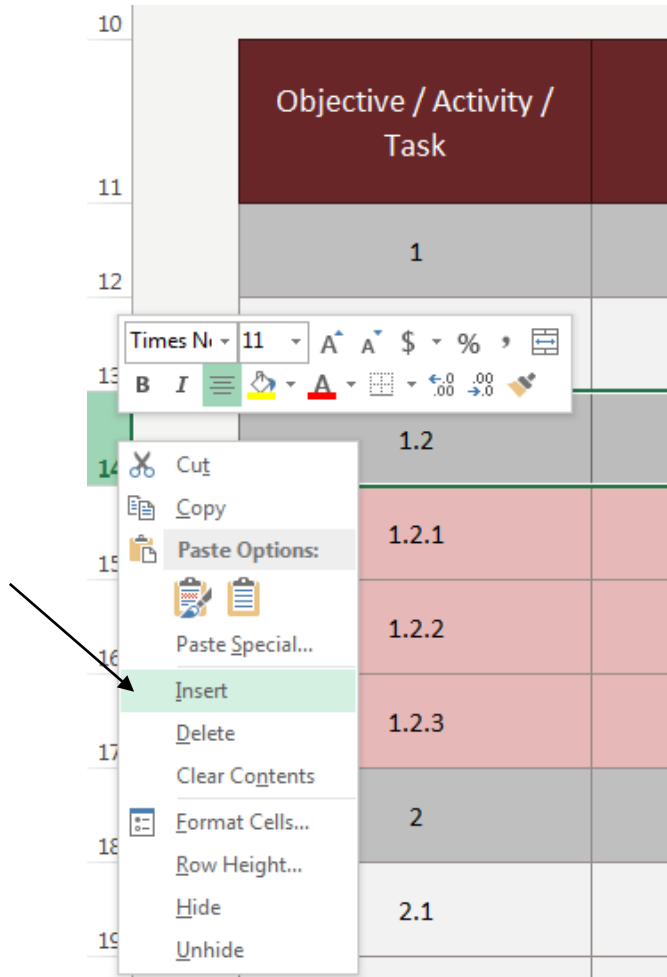
Inserting an objective/activity/task

- To insert a new objective/activity/task simply right click on the row that will follow the new objective/activity/task, and select insert.

- A new row will now appear above this row.

- Within the blank row, follow the numerical coding instruction (described earlier) to identify whether it is an objective, activity, or task.

GLOSSARY TAB
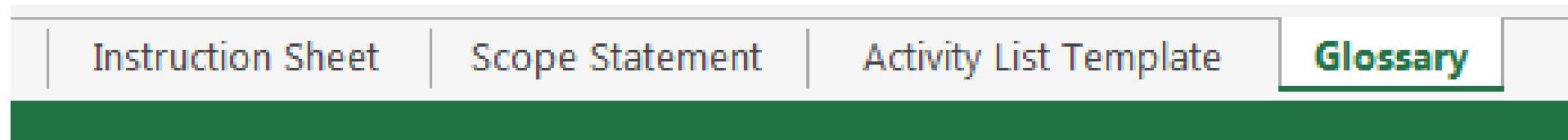
- This tab provides the researcher definitions to terms within the Project Scope Templates.