



# PROJECT MANAGEMENT GUIDE



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# **1 PROJECT MANAGEMENT METHODOLOGY**

## **1.1 INTRODUCTION**

The *Project Management Guide* ensures the approach used by all Scheme Agents when implementing change is consistent.

The methodology outlined in this guide represents a generic approach based on the principles of best-practice project management, and is designed to complement existing methodologies and processes used by a Scheme Agent in the delivery of project work.

The primary focus of this methodology is to provide WorkCover with knowledge of the Scheme Agent's project planning and cost estimates to facilitate WorkCover's administration activities.

A Scheme Agent must adopt this project management methodology, unless it receives approval from the Nominal Insurer to use an alternative methodology.

## **1.2 OBJECTIVES**

The objectives of the *Project Management Guide* are to:

- improve WorkCover's visibility of the Scheme Agent's planning, strategy, management, progress and financial management of implementing projects
- promote thorough project planning and qualification practices
- provide a standard approach for implementing projects across all Scheme Agents.

## **1.3 SCOPE**

This methodology outlined in this guide covers:

- all projects specified by WorkCover
- approved contract variations in accordance with Schedule 7 – Variation framework.

It does not cover:

- any Scheme Agent change not directly associated with Workcover documented requirements
- any changes or omissions not included within the formal project management process
- projects initiated by a Scheme Agent.

## **1.4 ROLES AND RESPONSIBILITIES**

The roles and responsibilities of each party are outlined below.

<b>WorkCover</b>	<ul style="list-style-type: none"><li>• provision of requirements</li><li>• project reviews and acceptance of timeframes and costs</li><li>• ongoing support to a Scheme Agent</li><li>• provision of relevant resources and infrastructure to meet WorkCover obligations</li></ul>
<b>Scheme Agent</b>	<ul style="list-style-type: none"><li>• conduct all WorkCover-related projects in accordance with the specification of requirements</li><li>• ensure the timely delivery of all aspects of the projects within agreed timeframes and budgets</li></ul>

## **1.5 REMUNERATION**

WorkCover will remunerate a Scheme Agent for implementing WorkCover-approved projects as per the Deed between the Nominal Insurer and the Scheme Agent.

The remuneration model will be fix-priced. Once the Scheme Agent's planning and costs have been reviewed and approved, WorkCover will provide funding aligned to project deliverables and milestones.

The Scheme Agent must provide all supporting documentation and activities associated with a project. Once WorkCover has approved a project, no variation to cost will be accepted unless WorkCover approves the change.

## **1.6 WORKCOVER ASSISTANCE**

Enquiries about any aspect of this guide should be directed to the Agent Contracts Branch of WorkCover.

## **2 PROJECT MANAGEMENT OVERVIEW**

This chapter provides a Scheme Agent with an understanding of WorkCover's expectations for managing WorkCover projects.

For IT systems development projects, a diagrammatic representation of the WorkCover System Delivery Lifecycle Diagram (SDLD) methodology is included at Appendix A .

### **2.1 REQUIREMENTS**

The requirements for all projects will be incorporated into the project management plan document based on an approved contract variation in accordance with Schedule 7 – Variation framework

Variations to the requirements will be managed through the WorkCover change management process, as described in Schedule 7.

### **2.2 PROJECT REVIEWS AND ACCEPTANCE**

WorkCover reviews maintain awareness of each Scheme Agent's status and progress throughout the project lifecycle. Project reviews will be scheduled as deemed necessary by WorkCover.

Reviews will be minuted using the WorkCover status report template. Details of project milestones and costs will be recorded, together with any issues that need to be addressed by either party and agreed dates for completion. A copy of the minutes will be supplied to the Scheme Agent project manager and a follow-up meeting arranged.

#### ***Initial project review***

The initial project review is mandatory. in accordance with the WorkCover requirements section of the business and technical requirements overview document.

The objective of the initial project review is to:

- qualify the completeness of the project planning
- assess the reasonableness of the project cost and timelines
- ensure the WorkCover templates have been used.

The Scheme Agent project manager must provide an updated project status report. WorkCover is responsible for taking review minutes.

The initial review for a project will involve an examination of the:

- project management plan
- project schedule
- business/technical design
- test plan
- risk management plan
- issue management plan

#### ***WorkCover deliverables***

WorkCover is responsible for providing clear direction to the Scheme Agent regarding the nature and scope of the project to be undertaken. WorkCover will provide the Scheme Agent with business requirements specifications.

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The Scheme Agent, in conjunction with WorkCover, will review the WorkCover deliverables prior to the initial project review.

### **2.3 PROJECT EXECUTION**

The Scheme Agent is at liberty to commence an approved-WorkCover project at their discretion. WorkCover will only remunerate the Scheme Agent if the project has been reviewed and accepted.

Periodic reviews to track progress and status will be conducted during the project. WorkCover and the Scheme Agent will arrange reviews on a periodic basis and/or as deemed necessary. WorkCover will provide the Scheme Agent with a minimum of one week's notice for any unscheduled review.

### **2.4 CHANGE MANAGEMENT**

All changes to the project after formal approval must be documented using the WorkCover template. Details of changes will be examined at status reviews and accepted into the project scope at WorkCover discretion. A change request must only be included into the scope of a project once WorkCover has formally accepted the change.

Once a Scheme Agent's project has been initially reviewed and accepted by WorkCover, the costs of any change (unless introduced formally by WorkCover) will be borne by the Scheme Agent. Delays in achieving the scheduled project delivery date are the Scheme Agent's responsibility.

### **2.5 PROJECT IMPLEMENTATION AND ACCEPTANCE**

A Scheme Agent may only implement their project after WorkCover has granted formal acceptance, using the formal project review process.

Acceptance criteria for a project is defined in the business and technical requirements overview document.

### 3 CHANGE MANAGEMENT METHODOLOGY

This chapter defines each component of the project management deliverables and sets expectations between WorkCover and the Scheme Agent.

#### 3.1 EXTERNAL AUDIT REQUIREMENTS

WorkCover reserves the right to request the formal review of the Scheme Agent's applications in the form of an external audit. The audit will ensure that all Scheme Agent applications meet a consistent and known standard over the medium- to long-term.

A Scheme Agent will be made aware of the need for an audit through the business and technical requirements overview document provided with the release of the operational document set.

Prior to the release of new manuals, WorkCover will engage an external auditor and specify the audit requirements. The business and technical requirements overview document provides the contact details necessary to arrange the audit and issues identified by the audit will be in the form of a requirement explaining what must be done. The Scheme Agent must include these requirements in the project scope.

#### 3.2 PROJECT MANAGEMENT PLAN

The project management plan is the responsibility of the Scheme Agent project manager, or the most senior person responsible for the overall success and management of the project. The plan ensures that all management aspects of a project have been formally considered.

Aspects associated with the project management plan include:

<b>Executive summary</b>	<ul style="list-style-type: none"> <li>• Provide a complete executive summary of the project</li> </ul>
<b>Objective(s)</b>	<ul style="list-style-type: none"> <li>• Provide an overview of the objectives and planned outcomes of the project</li> </ul>
<b>Scope</b>	<ul style="list-style-type: none"> <li>• Outline the scope of the project, including areas in and out of scope</li> <li>• Defining the scope ensures the scale of the project is clearly outlined and understood. Areas deemed outside the scope of the project must be justified to ensure the overall scope is qualified</li> </ul>
<b>Project governance</b>	<ul style="list-style-type: none"> <li>• Defining the roles and responsibilities ensures that all roles have been accounted for and the person accountable for delivery is defined</li> <li>• Outline the roles associated with the project, the responsibilities associated with each role and the team member assigned this role</li> <li>• Describe how project governance ensures the delivery of the project</li> </ul>
<b>Dependencies</b>	<ul style="list-style-type: none"> <li>• Outline any dependencies that this project has with internal and external parties</li> <li>• Outline any dependencies that this project has on other project activities within the organisation</li> <li>• Describe the nature of the dependency and the primary contact</li> </ul>

	to be used for communication purposes
<b>Assumptions</b>	<ul style="list-style-type: none"> <li>Outline any assumptions that have been used to devise the content of the project planning documentation</li> </ul>
<b>Milestones</b>	<ul style="list-style-type: none"> <li>Provide a summary of the project milestones and planned dates of the project schedule</li> </ul>
<b>Deliverables</b>	<ul style="list-style-type: none"> <li>Outline all key deliverables of the project, including the measures against which the deliverables will be accepted by the organisation</li> </ul>
<b>Stakeholders</b>	<ul style="list-style-type: none"> <li>Identify all stakeholders associated with the project</li> </ul>
<b>Communication</b>	<ul style="list-style-type: none"> <li>Outline the communication approach to be adopted by the project</li> </ul>
<b>Risks</b>	<ul style="list-style-type: none"> <li>Outline known risks associated with the delivery of the project</li> <li>Outline your approach to risk management for the project lifecycle</li> </ul>
<b>Issues</b>	<ul style="list-style-type: none"> <li>Outline known issues associated with the delivery of the project or project outcomes</li> <li>Outline your approach to issues management for the project lifecycle</li> </ul>
<b>Testing</b>	<ul style="list-style-type: none"> <li>Outline the approach to be taken to testing &amp; acceptance within the project</li> </ul>
<b>Change management</b>	<ul style="list-style-type: none"> <li>Outline your approach to change management for the project lifecycle</li> </ul>

### **3.3 BUSINESS/TECHNICAL DESIGN**

The business/technical design is the responsibility of the Scheme Agent project manager assigned to the project.

The business/technical design document is to associate each requirement to units of work to be performed by the project team members. The document must demonstrate that:

- all requirements have been considered in their entirety
- any requirement that is deemed not to be in scope is qualified with an explanation
- all requirements deemed to be in scope are directly assigned to units of work – a requirement might impact more than one unit of work (a cross reference is useful).

The primary sections of a business/technical design document are found in the design and specification sections.

The design section describes the existing or new system/processes at a high-level and outlines how the project will work, including the process flows between applications and users.

When describing batch processes, all files must be denoted.

The specification section identifies areas impacted as a consequence of the requirements. Each specification must state the details of the change to be performed in a clear and concise manner. All requirements qualifying the change must be identified.

### **3.4 TECHNICAL SPECIFICATIONS**

For projects that require system/IT changes, the development of the technical specification document is the responsibility of the senior technical leader assigned to the project. This document is optional and no template is provided. Should the decision be made not to have a specification document, the details of the components to be changed and the details of the change must be included in the business/technical design document.

### **3.5 TEST AND ACCEPTANCE PLAN**

The construction and maintenance of the test and acceptance plan is the responsibility of the person assigned the role in the project management plan.

The objective of the test and acceptance plan is to ensure that all facets of the project have been inspected and accepted before impacting a business function/system.

The design of test cases must verify that functionality performs as specified by the requirements supplied by WorkCover, as well as ensuring other existing functionality has not been impacted.

The Scheme Agent must be able to leverage from their standard test plan and modify or introduce test cases and acceptance criteria in accordance with the requirements. Test cases and acceptance criteria must also specify expected results to verify the correct output.

For WorkCover planning purposes, the test and acceptance plan must also document test cases involving WorkCover.

The project manager must use the WorkCover supplied project schedule template. Guidelines for constructing a project schedule can be found in Appendix B.

### **3.6 PROJECT SCHEDULE**

The construction and maintenance of the project schedule is the responsibility of the person assigned the role in the project management plan.

The project schedule consolidates all aspects of the project lifecycle as a series of milestones and tasks that are allocated to individuals to perform.

### **3.7 RISK MANAGEMENT PLANS**

The project manager is responsible for preparing and maintaining the risk management plan.

A risk in the context of a WorkCover project is any risk that may potentially impact the project delivery and, therefore, must be managed throughout the life of the project. Ongoing management of risks is necessary to evaluate the likelihood of the risk occurring and the impact the risk will have to the project in the event it happens.

Evidence of active risk management will be a checklist item in WorkCover reviews.

### **3.8 ISSUE MANAGEMENT**

The project manager is responsible for maintaining the issues register.

An issue is anything that impacts the project schedule and requires tracking to ensure mitigation is undertaken. Issues, which cannot be resolved, may be reclassified as risks. The issue register must identify to whom the issue has been assigned, the assignment date and expected completion date.

Evidence of active Issue management will be a checklist item in WorkCover reviews.

## **4 PROJECT TEMPLATES**

Project Management Plan (MS Word)

Project Schedule (MS Project)

Technical Design (MS Word)

System Test Plan (MS Word)

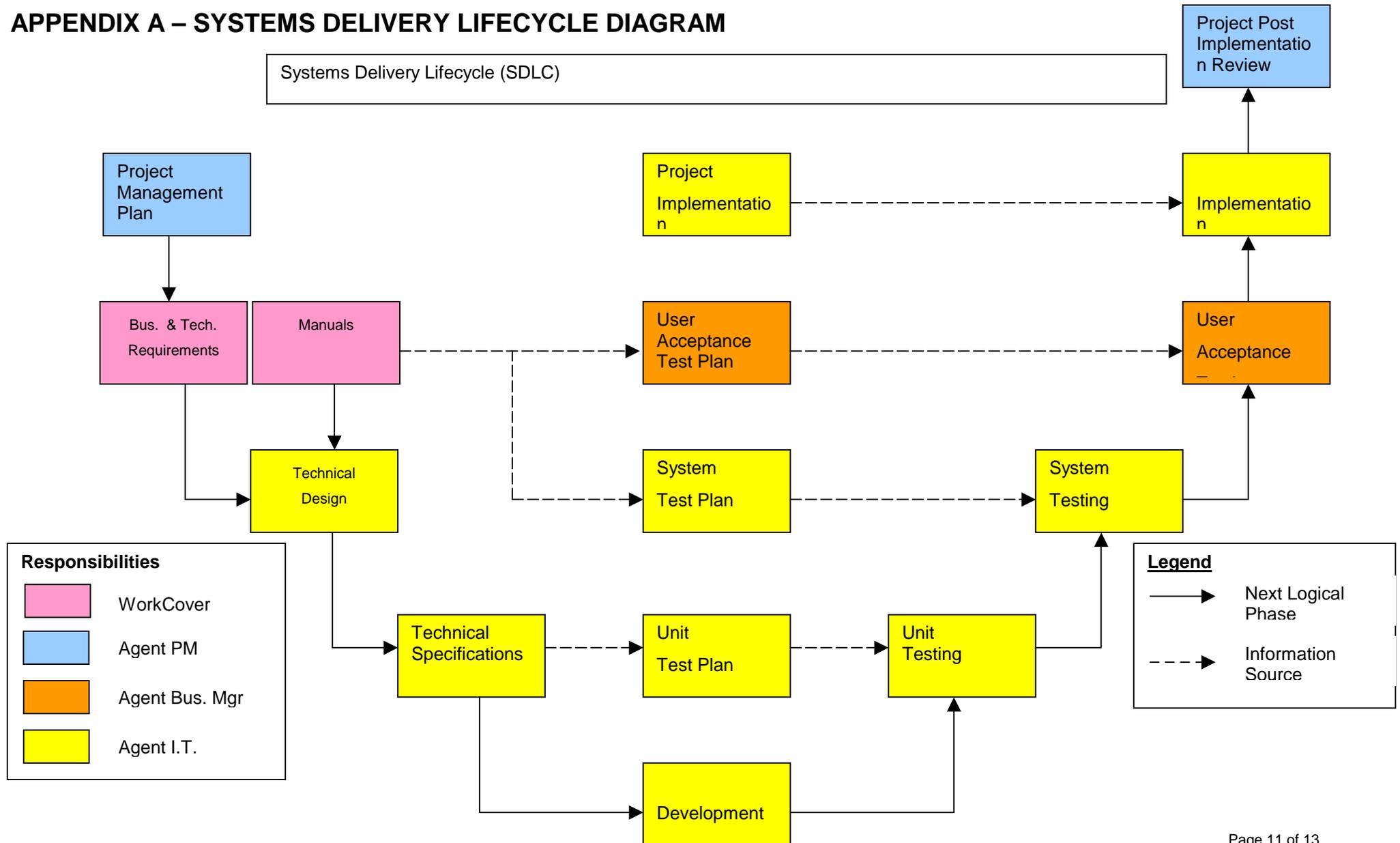
Risk Management Register (MS Word)

Issues Register (MS Word)

Change Request (MS Word)

Status Report (MS Word)

## APPENDIX A – SYSTEMS DELIVERY LIFECYCLE DIAGRAM



## APPENDIX B – INSTRUCTIONS FOR COMPLETING A WORKCOVER PROJECT SCHEDULE

### Guidelines for creating a project schedule

- use the WorkCover project template available in the Operational Document Set
- complete all project phases
- enter your project commencement date in Agent project start date (line 2 of template)
- task naming conventions to be used are defined in the definitions section of this document
- only one resource to be assigned to any task
- do not assign resources to group tasks
- enter estimate into work
- do not baseline your project plan until it has been formally signed-off.

### Definitions

<b>External dependencies</b>	<p>This section identifies dependencies that are outside the control of the project. Each task must be monitored and managed according to the level of risk they impose on the projects ability to achieve the deadlines.</p> <p>Task naming convention is &lt;&lt;Dept. Responsible for Task&gt; - &lt;Task Description&gt;&gt;</p> <p>eg. "WorkCover – Claims and Policy Requirements"</p>
<b>Change requests</b>	<p>A change request is a mini project where the requirement, impact analysis and scheduling of work needs to be accounted for.</p> <p>All changes that impact the agreed implementation date between WorkCover and the Scheme Agent must be defined in this section.</p> <p>Change Requests, unless originated by WorkCover will not be remunerated. For WorkCover to remunerate a change request the change documentation must be signed by the WorkCover reviewer for acceptance of payment.</p>
<b>Requirements analysis</b>	<p>The requirements analysis phase is the period of time allocated to review the requirements and specify the changes necessary to the Agents application.</p> <p>WorkCover will specify the time for this period.</p>
<b>BUSINESS / TECHNICAL DESIGN</b>	<p>The Business / Technical Design phase represents a technical analysis of the requirements as they impact the agent.</p> <p>All requirements must be represented in this document.</p>
<b>Technical specification</b>	<p>For IT / System based projects, the Technical Specification</p>

	<p>phase identifies each unit of work to be completed during the construction phase.</p> <p>Essentially each program, database table, training script etc, which is modified, deleted, or is a new module must be identified with a description of the change.</p> <p>Depending on the scale of the requirements this phase may be merged with the Technical Design document.</p>
<b>Construction</b>	<p>For IT / System based projects, construction represents the code and unit test phase of the project. Each module identified in the Technical review phase must be recorded in this section.</p> <p>Naming Convention: &lt;&lt;Module Name – Module Description&gt;&gt;</p> <p>No task should have more than one resource assigned (the reason for this is to make levelling easier).</p> <p>The effort must be entered in the 'Actual work' cell.</p> <p>Use the predecessor cell to link tasks at resource level.</p>
<b>System test</b>	<p>For IT / System based projects, system testing is the responsibility of IT. The objective being to confirm the completed solution functions in accordance with the Requirements.</p> <p>The System Test Plan and Test Scripts are to be written in conjunction with Technical Design project phase.</p> <p>When constructing the schedule for system test use headings to describe the test phase in accordance with your Test Plan and create sub-tasks that cross-reference the test cases. Test cases should only have one resource assigned.</p>
<b>User acceptance test</b>	<p>User Acceptance Testing is the businesses opportunity to confirm the delivered solution meets the requirements.</p> <p>WorkCover will be involved with this phase where interface components require confirmation.</p> <p>As with the System Test phase use headings to describe the test phase in accordance with your Test Plan and create sub-tasks that cross-reference the test cases.</p>
<b>Implementation</b>	<p>The Implementation Plan is an inventory of modules that will be moved into the production environment. This document can be produced during and after the construction phase.</p>