Project Charter

Roll-out of PM within Department ZZ

Date: 01/09/2022
Doc. Version: 1.0
Template version: 3.0.1

Document Control Information

Settings	Value
Document Title:	Project Charter
Project Title:	Roll-out of PM within Department ZZ
Document Author:	Mr X
Project Owner:	Head of Department
Project Manager:	Not yet Assigned
Doc. Version:	1.0
Sensitivity:	<Public, Limited, High>
Date:	01/09/2022

Document Approver(s) and Reviewer(s):

NOTE: All Approvers are required. Records of each approver must be maintained.

All reviewers in the list are considered required unless explicitly listed as Optional.

Name	Role	Action	Date
Mr Y	Project Owner	Approved	01/09/2022

Document history:

The Document Author is authorized to make the following types of changes to the document without requiring that the document be re-approved:

- Editorial, formatting, and spelling
- Clarification

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Changes to this document are summarized in the following table in reverse chronological order (latest version first).

Revision	Date	Created by	Short Description of Changes
1.0	01/09/2022	Mr Y	First approved version.

Configuration Management: Document Location

The latest version of this controlled document is stored in U:\METHODS\PM²@DepartmentZZ

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1 EXECUTIVE SUMMARY

The adoption of PM^2 in the Department will increase the maturity of project management within the Department and respond to identified issues such as unsuccessful projects, waste of resources, lack of control of outsourced projects and poor quality of deliveries. The current situation has already impacted the image and reputation of the Department by external entities and the achievement of Organisational objectives for the running program.

A new program is starting in the beginning of 202X + 1 year and it is urgent to change the current situation, in order to achieve the objectives from 202X+1 to 202Y in our domain.

The chosen solution (adoption of the PM² methodology) is the recommended project management methodology of many public as well as private sectors aligned with the rationalisation exercise.

Concluding, the adoption of the PM² methodology is the solution that gives the greater outcomes with a smaller budget and it is aligned with the corporate Decision for managing projects Organisational wide.

2 CONSIDERATIONS ON THE BUSINESS CASE

Ad-hoc approaches for managing several projects within the Department cause miscommunication, lack of stakeholder engagement, inefficiencies, duplication of work, poor planning and controlling of project work within the Department, as well as with contractors. This (often) leads to frustration, cost and schedule overruns, low quality of deliverables, increased risk of project failure, unsatisfied stakeholders/users and disputes with contractors.

An improved maturity of project management within the Department is urgent because a significant number of projects failed, are substantially delayed or exceed the planned budgets. Additionally, a new program is starting in the beginning of 202X + 1 year and will request that the project management methodology is operational and well understood on the 1st of January 202X + 1 year.

The selected alternative to implement the solution is the adoption of PM^2 in the Department, as it is already a methodology tailored to both public and private sector needs and complying with specific standards. Moreover, PM^2 is a Project Management Methodology developed and centrally supported by the CoEPM^2 with a full training and certification programme available. Considering this, competences are available in-house and costs will be lower than implementing other established standard such as PRINCE2 or PMI/PMBOK.

This project is in-line with the CTI decision of January 2011 (PM² is the recommended project management methodology for all IT projects) and with the Organisation policy that encourages project improvement in all Department.

The outcomes that can be expected from this project are:
• Increased project productivity (ability to cover more projects in the new program);

• Improved quality of project deliverables, so policy objectives are achieved more effectively;

• Improved project stakeholder engagement (Business Managers and Project Owners are deeply involved from the beginning of the project and Senior Management is regularly monitoring projects performance and benefits);

• Increased successful projects within Department, by improved monitoring, control and reporting on projects. Projects monitoring and control will be also performed by the Project support Office and by the Department Project Management Office, so different entities will perform quality assurance activities (e.g. phase-exit reviews) in order to increase the probability of projects success;

- Maximization of investments value by better visibility of project needs, benefits, impact, synergies, costs and risks by the Senior Management. PM^2 will enable projects within Department to effectively follow Organisation governance project approval process, as it makes project management processes standard and mandatory;

- Improved control of outsourcing activities and increased quality of contractors' deliverables. PM^2 provides artefacts to control outsourcing activities and processes to lead to deliverables acceptance in an effectively way.

- A common project management language that will facilitate the management of projects within several Department or Organisations.

- Improved image of the Department and Organisation by achieving to greater projects' results.

It must be noted that most of the benefits are obtained on medium and long term and can be only correctly validated after project closure. Despite this, the estimation of the benefits comprises no need of further resources to manage the new program, reduction of the costs on outsourced contracts and ability to cover more projects within the budget and to achieve more outcomes.

3 PROJECT DESCRIPTION

3.1 Scope

3.1.1 Includes ("IN" Scope)

The rolling-out of the project management methodology (PM^2) in the Department for all new and running projects (started from July 202X) includes:

• Tailoring the PM^2 methodology to Department needs;

• Executing a pilot project to identify any issues;

• Creating a wiki and a central project repository;

• Creating a Project Support Team;

• Defining and implementing a complete roadmap for organisational change;

• Providing training to all Unit staff.

3.1.2 Excludes ("OUT" Scope)

The envisaged solution <u>WILL NOT COVER</u> the implementation of a Project Management Information System to support the PM^2 methodology. This can be foreseen in a next phase, but not included in the scope of this project. Also, the support and training on the PM^2 methodology to the Organisation Project Management Office and to other Departments are not covered by this project.

3.1.3 Scope Statement

Rolling-out of the Project Management Methodology (PM^2) in the Department for all new and running projects, including training staff involved in projects and creation of a project management governance structure and tools (i.e. Project Support Team, project repository and Department Wiki).

3.2 Success Criteria

• Core set of project management templates are used by 90% of the projects within the Department (measured at the end of the project).
• All closed projects are archived in the Project Repository.
• The Project support Office is capable of supporting all the staff requests.
• The Department Wiki is available 90% of the time and the templates available are up to date.
• Project management templates (i.e. Business Case, Project Charter, Project Progress Report and Project-End Report) are approved by the Organisation Governance Bodies.
• All existing procedures and templates for contractors are reviewed, updated and agreed with the Procurement Unit.
• 90% of Project Managers and 50% of staff involved in projects are trained in PM².
• 70% of the Project Managers are project management certified in PM².

3.3 Stakeholder and User Needs

ID	Need Description	Priority
1	Department staff (particularly the Head of Department) demands an improved maturity of project management in the Department (quality of project outputs, effectiveness and efficiency of project work and project management processes).	Very High
2	Senior Management demands improved projects	Very High

	monitoring and reporting in order to make more informed and rational decisions on investments. Head of Department find it hard to collect information for reporting and the current Department 's performance is below objectives.	
3	Business Managers cannot get the expected results from Outsourcers. An improved management of contractors will have a substantial positive effect on the projects' cost and on the quality of contractor's deliverables. Additionally, ad-hoc project management approaches are not compliant with the processes and requirements of the Procurement Unit.	Very High
4	A new program is starting in the beginning of 202X + 1 year and the budget is very tight for the expected number of projects. This new program will oblige the consolidation and reporting of information to external entities and to other Organisations so a unique methodology will reduce the FTEs to perform the reporting process.	Very High
5	Projects that are covering different teams need to share the same project management approach.	High
6	Projects are not following Organisation's governance process.	High
7	The Internal Audit Services identified non conformities in the last audit, stating that the use of ad-hoc project management approaches could lead to situations of fraud in the granting process.	Very High
8	The Project Management Office of the Organisation is demanding the use of a standard methodology, in order to be able to monitor and control projects from Department.	High

3.4 Deliverables

ID	Deliverable Name	Deliverable Description
1	Tailoring of PM² to the Department's needs	This deliverable will include the following sub-deliverables: • PM² processes, guidelines, artefacts and governance model tailored to Organisation needs; • Project management artefacts for monitoring Department's outsourced projects; • Project management artefacts for reporting to external entities; • Reviewed Department roles and responsibilities.
2	Department Wiki	Creation of a Wiki for to make all PM² processes, guidelines, artefacts and governance model

ID	Deliverable Name	Deliverable Description
		available.
3	Central Project Repository	Creation of a Project Repository for all projects within the Department. This repository will follow a defined configuration management process, aligned with the document and configuration management procedures already in place in the Organisation. The Project Repository will include a Lessons Learned repository.
4	Set-up of a Project Support Office	The Project Support Office will be managed by an Official and the tasks will be performed by an Consultants. The main tasks of this team are: • Advice staff on PM^2 methodology and provide guidance on administrative services related to project management; • Monitoring projects performance and produce consolidated reporting to the Head of Department; • Review the reporting to external entities, in order to guarantee the quality of the deliverables; • Manage the content of the wiki, including updating the artefacts templates for continuous improvement; • Guarantee the correct application of the configuration management process in the Project Repository; • Be the first level support for PM^2 methodology and centralise the contact to CoEPM^2 team (second level support); • Perform reviews of projects within the Department, in terms of verifying the compliance with the project management methodology and corporate processes.
5	PM² Transition Management	This deliverable will include the following sub-deliverables: • Definition of the roadmap and procedures for all running and new projects; • Execution of a pilot project and follow-up of the entire lifecycle of the project; • Follow-up of running projects transition; • Execution of a Workshop.
6	PM² Business Implementation	This deliverable will include the following sub-deliverables: • Production of the Communication material; • Execution of internal awareness sessions; • Coordination of the training program; • Communication/interaction with external

ID	Deliverable Name	Deliverable Description
		entities; • Project support Office activities.
7	Training	This deliverable will be part of the business implementation plan and includes the following sub-deliverables: • Training of all Project Managers, Business Managers and Project Core Team members (total of 20 people) to the level of PM^2 Certification Level 1 - PM^2 Certified; • Training of 5 Project Managers to the level of PM^2 Practitioner; • Training of Head of Department and the Deputy of the Head of Department through the PM^2 for Management path.

3.5   Features

Related Need	Features	Deliverable(s)
1	PM^2 processes, guidelines, artefacts and governance model tailored to Organisation needs for managing the entire projects lifecycle. Wiki for making available all PM^2 processes, guidelines, artefacts and governance model to Department staff. Project and Lessons Learned Repository for all projects within the Department. PM^2 first level support. Implementation of the Department organisational change through: awareness sessions, training, communication to external entities and production of communication material.	• Tailoring of PM² to Department's needs • Department Wiki • Central Project Repository • Set-up of a Project Support Team • PM² Business Implementation • Training
2	PM^2 artefacts and processes for monitoring, control and report on project performance. Tailored PM^2 artefacts and processes for reporting to external entities. Project Support Team: consolidated reporting to the Head of Department, perform reviews of projects within the Department and review the reporting to external entities. Awareness sessions. PM^2 training courses for Management.	• Tailoring of PM² to Department's needs • Set-up of a Project Support Team • PM² Business Implementation • Training
3	PM^2 artefacts for monitoring Department's outsourced projects. Awareness session for Contractors.	• Tailoring of PM² to Department's needs • PM² Business Implementation
4	PM^2 processes, guidelines, artefacts and governance model tailored to Organisation needs for managing	• Tailoring of PM² to

	the entire projects lifecycle. Tailored PM^2 artefacts and processes for reporting to external entities. Project Support Team: consolidated reporting to the Head of Department, performs reviews of projects within the Department and reviews the reporting to external entities.	Department's needs
5, 6, 7 and 8	PM^2 processes, guidelines, artefacts and governance model tailored to Organisation specificities for managing the entire projects lifecycle.	• Tailoring of PM² to Department's needs

3.6   Constraints

• Limited support available from PM^2 experienced Organisation experts.
• Limited availability of the Department staff and Senior Management for trainings, awareness sessions and workshops, due to a busy agenda.
• The methodology must be delivered by the end of the year (31st December 202X).
• Projects within Department should not be impacted more than 2% on project schedule, in result of the new methodology.
• Availability of the Management of the Organisation Procurement Unit for the alignment of project controls while working with contractors.
• Large tailoring of the chosen project management methodology is only foreseen for exceptional situations.

3.7   Assumptions

• No major changes on the chosen project management methodology during project duration.
• Coaching and support will be available from the Organisation to Department's staff throughout the duration of the PM^2 Adoption.
• Sufficient training options available within the Organisation PM^2 training calendar.
• Buy-in from Department and Organisation Senior Management (recognition of the need for a project management methodology).
• Willingness and availability of Senior Management for a high-level awareness and training session.
• Training room and training material availability for the selected project management method.
• The project will receive appropriate resources (financial and Human Resources).

3.8   Risks

ID	Risk Description & Details	Status	Likelihood[1]	Impact[2]	Risk Level[3]	Risk Owner	Risk Response Strategy[4]	Action Details
1	Resistance to change that will result on Project Managers not	Approved	2	4	8	PO	Reduce	The project is planning 3 actions related to this risk: 1. One awareness session at the beginning of the executing phase and one workshop before

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[1] A numeric value denoting the relative probability that the risk should occur.
[2] A numeric value denoting the relative severity of the impact of the risk if it should occur.
[3] The risk level is the product of the likelihood and impact (RL=L*I).
[4] The possible risk response strategies are: Avoid/ Transfer or Share/ Reduce / Accept.

ID	Risk Description & Details	Status	Likelihood[1]	Impact[2]	Risk Level[3]	Risk Owner	Risk Response Strategy[4]	Action Details
	following the methodology.							PM[2] becomes officially operational, for collecting issues and recommendations from the transition experience. 2. Training sessions for PMs that will enable them to follow the methodology. 3. Project Support Team: will support PMs in the use of the methodology and act as a facilitator to the change process.
2	The chosen methodology is not fitting Department needs and major tailoring is needed, impacting the delivery date.	Approved	2	5	10	PO	Reduce	Performance of a Pilot project to verify adequacy of the methodology to the Department's projects. This pilot will be an internal project that will start in March until May 201X. Regular follow-up will guarantee that issues are timely identified and acted-upon.
3	A new release of the chosen project management methodology is delivered during project lifecycle, resulting into two situations: adapting to the new release or use an outdated version.	Waiting for Approval	4	4	16	PO	Reduce	Meeting with Organisation PM[2] team to identify the planning for next releases or updates and only high level tailoring is allowed.
4	Significant delays on schedule for some projects within Department, during implementation.	Approved	3	4	12	PO	Reduce	Project Support Office: will support PMs in the use of the methodology and act as a facilitator to the change process. Additionally, this Office will monitor projects and recommend actions to the PSC.
5	Decrease in productivity due to learning curve effects that will impact projects' schedules.	Approved	3	3	6	PO	Accept	This impact is expected and a delay is already foreseen (less than 2% on schedule).

ID	Risk Description & Details	Status	Likelihood[1]	Impact[2]	Risk Level[3]	Risk Owner	Risk Response Strategy [4]	Action Details
6	Lack of support from key-stakeholders that will result on limited adherence to the new methodology.	Approved	2	4	8	PO	Reduce	The project is planning awareness sessions, workshops and training sessions to involve all the stakeholders. Additionally, communication material will be delivered to support the change. Moreover, a Project support Office will follow the adherence to the methodology and identify any issue if occurs. Other Departments, organisations, contractors and external entities will be involved in working groups, awareness sessions and tailored communications.
7	Unavailability of courses for the selected project management method (fully booked) that will delay training activity.	Investigating				PO		
8	Delays on contractors' projects caused by the mismatch of the methodology with the project management approach of contractors.	Approved	3	4	12	PO	Reduce	For the running projects, meetings with Contractors will be planned to present the methodology and agree on the expected outputs. For all projects, each Contractor will be able to attend an awareness session.
9	Lack of support from other organisation Departments, such as Procurement Unit.	Approved	1	4	4	PO	Accept	The likelihood for this risk is very low. Additionally, the project plans the creation of a Working Group to align objectives and requirements. Awareness sessions will be also delivered.
10	Lack of available budget caused by delays in yearly budget approval.	Approved	2	5	10	PO	Reduce	As the Project Core Team is already working in the Department with an allocated budget line, this risk is unlikely to happen.
11	Unavailability of resources with the necessary skills.	Approved	1	5	5	PO	Accept	This risk is unlikely to happen, as the project will be supported by the Organisation PM[2] Team and a training program is foreseen for the Project Core Team (PM[2] Practitioner

ID	Risk Description & Details	Status	Likelihood[1]	Impact[2]	Risk Level[3]	Risk Owner	Risk Response Strategy[4]	Action Details
								certified).

4 COST, TIMING AND RESOURCES

4.1 Cost

This project will be mainly executed by 2 Staff (0.5 FTE) and 2 Consultants in the first year and maintained by 1 Consultant and 0.2 FTEs of an Staff, from the Department. Support/coaching will be performed by Organisation during the project. The cost of the PM^2 courses is supported by HR, if delivered by DTS. So, the estimated training cost is only including the cost of the certification exams (6K€). The PM^2 Team will perform the 2 awareness sessions and give coaching throughout the project.

The budget lines that will be used for this project are XX 01 02 11 04 and XX 01 02 11 06. The project will have an estimated total cost of 39 K€ + 0.7 FTE for 202X and a TCO of 105 K€ + 1.5 FTE.

Expenditure	202X Budget Line	202X Amount[5]	202(X+1) Budget Line	202(X+1) Amount	202(X+2) Budget Line	202(X+2) Amount	202(X+3) Budget Line	202(X+3) Amount	202(X+4) Budget Line	202(X+4) Amount	Total cost of ownership €	Total cost of ownership FTE
Solution Development[6] (k€)	XX 01 02 11 04	33 K€ 0.3 FTE									33 K€	0.3 FTE
Solution Maintenance[7] (k€)			XX 01 02 11 04	16.5 K€ 0.2 FTE	XX 01 02 11 04	16.5 K€ 0.2 FTE	XX 01 02 11 04	16.5 K€ 0.2 FTE	XX 01 02 11 04	16.5 K€ 0.2 FTE	66 K€	0.8 FTE
Support [8] (k€)	XX 01 02 11 04	0.2 FTE										0.2 FTE
Training[9] (k€)	XX 01 02 11 06	6 K€									6 K€	
Business implementation(k€)	XX 01 02 11 04	0.2 FTE										0.2 FTE
Total per year (k€)		39 K€		16.5 K€		16.5 K€		16.5 K€		16.5 K€	**105 K€**	
Total per year FTE officials[10]		0.7 FTE		0.2 FTE		0.2 FTE		0.2 FTE		0.2 FTE		**1.5 FTE**

Note: in this project, the total FTE per year represents the time spent by Staff or other Resources that are not directly a euro cost to the project. In 202X, there is also the effort of the PM² Team (Support) represented on the budget.

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[5] If you cannot provide an amount, provide at least a qualitative statement (e.g. 20 days of training, 2 laptops, etc.)
[6] Development: provide the total (anticipated) cost (human resources) for the development of the solution
[7] Maintenance: provide the total (anticipated) cost (human resources) in K€ per year to maintain the solution
[8] Support: provide the total (anticipated) cost (human resources) in K€ per year to support the solution (e.g. website, helpdesk, operations, etc.)
[9] Training: provide the total (anticipated) cost (human resources) to ensure the training of the users, the support and operations staff, etc.
[10] Total FTE officials: provide the total (anticipated) effort that will be spent by Commission officials on the project (in man-weeks, man-months or man-years).

4.2 Timing and Milestones

ID	Milestone Description	Target Delivery Date
	Initiating Phase	**22 February 202X**
1	Definition of the context, impact and outcomes of the envisaged solution	18 January 202X
2	Business Case approved	01 February 202X
3	Project Charter approved	22 February 202X
	Planning Phase	**15 March 202X**
4	Project planning artefacts approved	15 March 202X
	Executing Phase	**5 July 202X**
5	Identification of the gap between "As is" and "To be" and creation of a working group for interaction with other Units	15 March 202X
6	Executing Kick-off Awareness Session	15 March 202X
7	Communication material delivered	15 April 202X
8	Approval of the tailored PM² Methodology by the Organisation Project Management Board	16 April 202X
9	Approval of the Transition Roadmap and Procedures	16 April 202X
10	Creation of the Department's PM2 Wiki and project repository	23 April 202X
11	Project support Office officially operational	29 April 202X
12	Training completed	07 May 202X
13	Awareness Sessions completed	10 May 202X
14	Execution of the pilot completed	26 June 202X
15	Follow-up of running projects transition completed	02 July 202X
16	Workshop performed	05 July 202X
17	Formal deliverables acceptance	05 July 202X
	Closing Phase	**12 July 202X**
18	Project Final Acceptance	11 July 202X
19	Project closed	12 July 202X

4.3 Planned Resources

ID	Resource Requirement	Description
1	1 Project Manager from Department ZZ	This resource will act as the Project Manager of this project. The effort for this project will be 0.3 FTE. Ideally, the Project Manager will be a Head of Sector.
2	1 Business Manager from Department ZZ	This resource will manage the business implementation, including awareness sessions, training, communication material, and the relation with contractors, external entities and other Department / Organisations. Ideally, the Business Manager will be a Head of Sector. The effort for this project will be 0.2 FTE
3	2 Resources with Project Manager profile from Department ZZ	2 Consultant that are currently working as Project Managers and have the necessary skills to execute the project (already familiar with the PM^2 methodology).
4	1 PM^2 Trainer	The requested training sessions are available through Syslog and training is managed by DTS. So, this resource is available via the training services.
5	2 PM^2 Experts	Two PM^2 Experts to follow the project and give support when requested (number of hours agreed for each activity).

5 APPROACH

5.1 Methodology

This project will follow the PM^2 Methodology for all project activities.

5.2 Change Management

The change management, configuration management and organisational change for this process will follow the PM^2 Methodology.

5.2.1 Project Change

The change management process for this project is a five-step process and falls under the responsibilities of the Project Manager who should execute the process when required throughout the project lifecycle:

- Change Identification:

  A request for a change can be submitted formally via a Change Request Form, or can be identified and raised during meetings as a result of decisions, issues or risks. All changes are registered in the Change Log.

- Change Assessment and Action Recommendation:

  The evaluation of a project change will be documented by the Project Manager in the Change Log, which is then used as an input to the formal change approval by the appropriate decision makers (via a Change Request Form).

- Change Approval:

  The approval of a project change will follow the escalation process for this project, detailed in the Project Handbook.

  For changes which do not have significant impact on delivery time and budget, the changes can be approved during the Project Follow-up Meetings. Other changes (with High and very High Size) must be approved by the Project Steering Committee (PSC).

- Change Implementation:

  The activities related to the implementation of changes and their status will be documented in the Project Work Plan.

- Change Control:

  New or open changes will be identified/reassessed weekly during the Project Follow-up Meetings and the Project Manager will then update the Change Log with the results of the analysis/review. For the Medium, High and very High Size changes, the Project Manager will report on a monthly basis their status to the Project Steering Committee (PSC) and, when adequate, to other project stakeholders

5.2.2 Configuration Management

The project configuration management procedure will be used to manage deliverables effectively and to provide a single reliable reference to them, ensuring that the correct versions are delivered to the Project Owner.

This project will use the following file naming convention:

Files: (XX).(DocumentName).(ProjectName).(dd-mm-yyyy).v(x.x)

Project email subject tag: (ProjectName), (Topic), (type of communication, e.g. for approval, for information, for review, for action), (FreeText – if needed).

The location of the approved versions of project artefacts and deliverables is in: U:\METHODS\PM²@DepartmentZZ\Deliverables

U:\METHODS\PM²@DepartmentZZ\Project Artefacts

For this project, the Project Manager (PM) will structure the project management artefacts per PM^2 phase, following the below folder convention:

- 01 Initiating
- 02 Planning
- 03 Executing
- 04 Monitor & Control
- 05 Closing

5.2.3 Organisational Change

The organisational change process will be documented in the Business Implementation Plan, by the Business Manager. This artefact will identify the approach and planning related to the following activities: awareness sessions, training, workshop, communication material, and the interactions with vendors, external entities and other Department/Organisation.

6 GOVERNANCE AND STAKEHOLDERS

6.1 Structure

This project will follow the Standard PM^2 project structure.
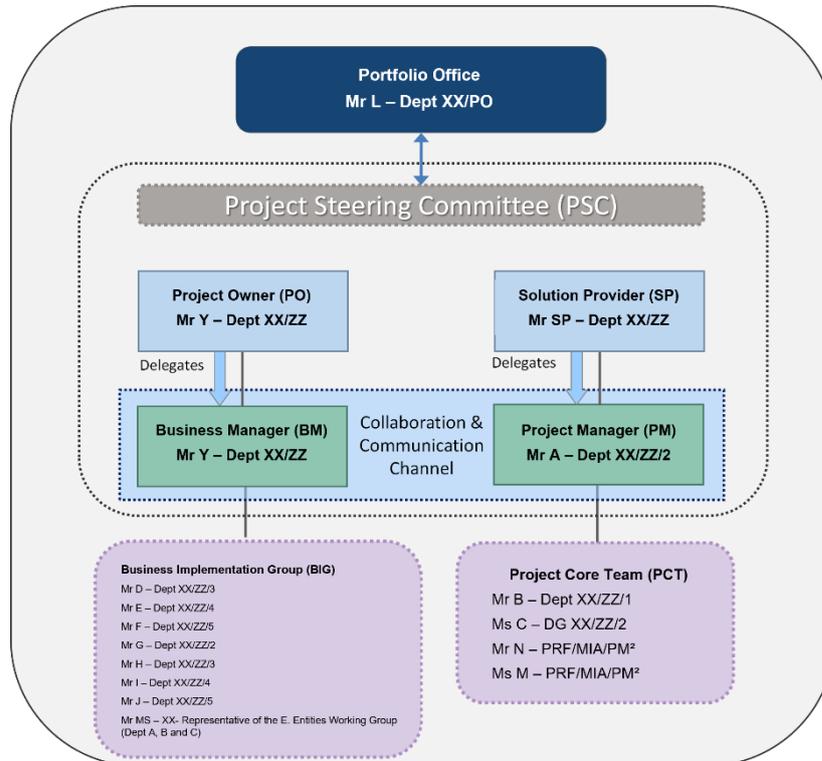
6.2 Roles and Responsibilities

This project will follow the Standard PM^2 Roles and Responsibilities and there are no deviations from the Standard Roles, except for the Project Support Team, which will be created as an output of this project. The main roles of this Team will be:

- Advice Department staff on PM^2 methodology and provide guidance on administrative services related to project management;

- Monitoring projects performance and produce consolidated reporting to the Head of Department;

- Review the reporting to external entities, in order to guarantee the quality of the deliverables;

- Manage the content of the wiki, including updating the artefacts templates for continuous improvement;

- Guarantee the correct application of the configuration management process in the Project Repository;

- Be the first level support for PM^2 methodology and centralise the contact to Organisation PM^2 team (second level support);

- Perform reviews of projects within the Department, in terms of verifying the compliance with the project management methodology and corporate processes.

6.3 Other Stakeholders

The other relevant stakeholders identified for this project are:

- **Contractors**: they will have to apply the PM^2 artefacts;

- **External entities**: these entities will receive an improved report format for the monthly reporting;

- **Procurement Unit**: PM^2 artefacts have to be aligned with the procurement process already in place in the Organisation;

- **Organisation Project Management Office**: this Office will receive regular reporting on projects' performance;

- **Organisation Governance Bodies:** these Bodies will have to approve the Business Case, Project Charter, Project Progress Report and Project-End Report templates.

APPENDIX 1: REFERENCES AND RELATED DOCUMENTS

<Use this section to reference (or append if needed in a separate annex) any relevant or additional information. Specify each reference or related document by title, version (if applicable), date, and source (e.g. the location of the document or the publishing organisation).>

ID	Reference or Related Document	Source or Link/Location
1	*<Example of a related document>* *<02.Business_Case.XYZ.dd-mm-yyyy.V.1.0.docx>*	*<Example of a location>* *< U:\ PROJECTS\ProjectX \Documents\>*
2	Project folder	*<Insert project folder location.>*