Work package – [Project]

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| **Work package identifier** |  | |
| **Title** |  | |
| **Date agreed** | **Team manager or person authorized** | |
|  |  | |
| **Description** | | |
|  | | |
| **Techniques, processes and procedures** |  | |
| **Development interfaces** |  | |
| **Operations and maintenance interfaces** |  | |
| **Change control requirements** |  | |
| **Joint agreements** |  | |
| **Tolerances** |  | |
| **Constraints** |  | |
| **Reporting arrangements** |  | |
| **Problem handling and escalation** |  | |
| **Extracts or references** |  | |
| **Approval method** |  | |
| **Approval Point** | **Person** | **Date** |
| **Initial authorization** |  |  |
| **Final acceptance** |  |  |

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| --- | --- | --- | --- |
| **Assessment of the work package performance (optional)** | | | |
|  | | | |
| **Assessment by** |  | **Date** |  |

Guidance on how to complete

***(Note: following completion of the work package the pages beyond this point can be deleted)***

## Purpose

A work package is a set of information about one or more required products collated by the project manager to pass responsibility for work or delivery formally to a team manager or team member.

## Composition

Although the content may vary greatly according to the relationship between the project manager and the recipient of the work package, it should cover:

* **Date**  The date of the agreement between the project manager and the team manager/person authorized
* **Team manager or person authorized** The name of the team manager or individual with whom the agreement has been made
* **Work package description** A description of the work to be done
* **Techniques, processes and procedures** Any techniques, tools, standards, processes or procedures to be used in the creation of the specialist products
* **Development interfaces** Interfaces that must be maintained while developing the products. These may be people providing information or those who need to receive information
* **Operations and maintenance interfaces** Identification of any specialist products with which the product(s) in the work package will have to interface during their operational life. These may be other products to be produced by the project, existing products, or those to be produced by other projects (e.g. if the project is part of a programme)
* **Change control requirements** A statement of any arrangements that must be made by the producer for:
  + version control of the products in the work package
  + obtaining copies of other products or their product descriptions
  + submission of the product to change control
  + any storage or security requirements
  + who, if anyone, needs to be advised of changes in the status of the work package
* **Joint agreements** Details of the agreements on effort, cost, start and end dates, and key milestones for the work package
* **Tolerances** Details of the tolerances for the work package (the tolerances will be for time and cost but may also include scope and risk)
* **Constraints** Any constraints (apart from the tolerances) on the work, people to be involved, timings, charges, rules to be followed (e.g. security and safety), etc.
* **Reporting arrangements** The expected frequency and content of checkpoint reports
* **Problem handling and escalation** This refers to the procedure for raising issues and risks
* **Extracts or references** Any extracts or references to related documents, specifically:
  + Stage plan extract This will be the relevant section of the stage plan for the current management stage or will be a pointer to it
  + Product description(s) This would normally be an attachment of the product description(s) for the products identified in the work package (note that the product description contains the quality methods to be used)
* **Approval method** The person, role or group who will approve the completed products within the work package, and how the project manager is to be advised of completion of the products and work package.

There should be space on the work package to record both its initial authorization and its acceptance and return as a completed work package. This can be enhanced to include an assessment of the work and go towards performance appraisal.

Projects with common controls across all work packages may simply cross-reference the controls defined in the project plan or stage plan.

## Derivation

The work package is derived from the following:

* existing commercial agreements between the customer and supplier (if any)
* quality management approach
* change control approach
* stage plan.

## Format and presentation

A work package can take a number of formats, including:

* a document
* a conversation between the project manager and a team manager
* an entry in a project management tool.

The work package will vary in content and in degree of formality, depending on circumstances. Where the work is being conducted by a team working directly under the project manager, the work package may be an oral instruction, although there are good reasons for putting it in writing, such as avoidance of misunderstanding and providing a link to performance assessment. Where the work is being carried out by a supplier under a contract and the project manager is part of the customer organization, there is a need for a formal written instruction in line with the standards laid down in that contract.

## Quality criteria

The following quality criteria apply to the work package:

* The required work package is clearly defined and understood by the assigned resource.
* There is a product description for each required product, with clearly identified and acceptable quality criteria.
* The product description(s) matches up with the other work package documentation.
* Standards for the work are agreed.
* The defined standards are in line with those applied to similar products.
* All necessary interfaces have been defined.
* The reporting arrangements include the provision for raising issues and risks.
* There is agreement between the project manager and the recipient on exactly what is to   
  be done.
* There is agreement on the constraints, including effort, cost and targets.
* The dates and effort are in line with those shown in the stage plan for the current   
  management stage.
* Reporting arrangements are defined.
* Any requirement for independent attendance at, and participation in, quality activities   
  is defined.