
**STANDARDS FOR AND
USES OF PROJECT
MANAGEMENT PLANS**

*Revised
February 1996*

STANDARDS FOR AND USES OF PROJECT MANAGEMENT PLANS

May Contain:

- Contractor and OPM logos in the same size and color scheme and with equivalent prominence

II. PROJECT SYNOPSIS

Use:

The project synopsis should describe the agency problem, or end purpose, that this project will address. Describe what the agency hopes to accomplish through this project. Identify the final end products of the project and discuss how these end products will help gain the desired results.

Form:

Write a simple narrative description of the project. Maximum line length for this description is seventy-five characters. Maximum length in lines of this description is fifty lines. Some contractors may wish to expand this section slightly and format it for the purpose of presentation to the client agency. In that case the contractor is to include a simple paragraph formatted in compliance with the above requirement in the appendices to the plan.

III. AGENCY OBJECTIVE

Use:

This section describes the purpose the project deliverables are intended to accomplish.

Contents:

- Very brief descriptions of jobs or occupations to be affected by the training project with pertinent factors, such as grade ranges (*e.g.*, civilian GS 9-11 air safety inspectors).
- Tasks for which performance is to be improved (*e.g.*, conduct inspections of private and commercial aircraft to identify safety hazards).

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- Agency purpose to be enhanced through performance improvement (e.g., make the air travel and transport industries safer).

IV. PROJECT CONTEXT

Use:

This section is an optional part of the Plan. It is often used when contractors find it valuable to provide a statement of background or history to help explain why they prepared the Plan as they did. It is a convenient place to discuss assumptions that apply to the whole project and not just to individual tasks. These might include assumptions on government-furnished materials, availability of subject-matter experts, or maximum length of time provided for government review. If you are aware of important agency requirements for this project which are not addressed by this plan, identify them here.

V. PLAN SUMMARY

Use:

This section of the Plan summarizes, for both the OPM Project Manager and the client agency point of contact, the tasks and deliverables as they relate to the accomplishment of the agency objectives. Tasks must have one or more deliverables, since a separate purchase order will normally be issued for each task. Task 0, representing the preparation cost of the management plan, should be included in all summaries and tables to reflect total project costs more accurately.

Form:

Include task number, task title [25 characters or less], and deliverable title [25 characters or less] followed by a short, one sentence description of the task, the total task cost and the performance period as in the example on the following page.

- Contractor labor costs shown here and in later task details should apply the appropriate option year rates, if known, for any tasks likely to begin after the end of the current option year of the contract.
- OPM fees, which are applied to all amounts paid by OPM to its contractors, should be included in all cost figures shown here, in later task details, and summary tables. At the issuance of this standard, these fees were normally 15%. Because there are rare exceptions, verify this rate with the OPM project manager.

12%

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VI. PLAN DETAIL

Use:

This section of the Plan will provide detailed descriptions of each task's deliverables, the activities resulting in deliverables and interim deliverables for these tasks such as progress reports and in-process review meeting notes, milestones, segments, etc. It also provides the detailed basis for the cost estimate for that task. It is used by the OPM project manager and the client-agency point of contact to analyze the fairness, completeness, and reasonableness of the plan.

A short task summary will be followed by a listing of the activities included in this task. The description of each activity may be brief, but the list must include all pertinent activities. In the example below, a survey is to be taken. The listed activities must explain the survey methods in enough detail to support the level of effort planned. Each task should generally begin on a separate page as in the example below:

Task 1 TITLE: Survey DELIVERABLE: Findings Report

Survey all readily-available instructional materials and information about the work, and report findings to designated Subject-Matter Experts for review.

COST: \$20,700

List of the Task Activities:

- 1.1 Complete a computerized literature search of the ERIC data base, ASTD data base, NTIS, and other data bases.
- 1.2 Conduct telephone interviews of a minimum of 10 training personnel from different Government agencies who have conducted similar types of training programs.
- 1.3 Review all related training materials to identify the intended target populations, learning objectives, and instructional methods/media used.
Deliverable: Interim Report of Findings
- 1.4 Review all student evaluation forms (approximately 200) completed for related courses with the client agency for the past 24 months.

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- 1.5 *Summarize findings and recommendations in a report.*
Deliverable: Final, fully-assembled report.
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Full Description of the Final Task Deliverables:

This description must tell enough about the nature of the final deliverable(s) of this task to communicate what is expected. For the example report, it would describe significant narrative sections, statistical tables, graphical displays and data appendices to be included and their approximate lengths. If the deliverable was a computer-based instruction (CBI) lesson, this description should communicate the learning objectives to be included, the nature and number of screens to be designed, the length of the lesson in CBI mode and how measured (*e.g.*, longest path) and the equivalent classroom hours. Typically some of this description will be by reference to the approved products of prior tasks (*e.g.*, course outline, lesson plan, story boards).

Resource Requirements:

The full description will be followed by a summary table of cost estimates and detailed description of all cost-estimating factors. These will include: a statement of anticipated elapsed time (*e.g.*, 11 weeks), a list of labor requirements (by category and number of days), computer requirements (both time and type), video requirements, travel estimate and other separately-priced or reimbursable items. Supplementary supporting materials such as pricing proposals, details of travel requirements (destinations, number of trips [2 people flying at the same time constitutes 2 trips], total number of days at each destination, mode of transport), demonstration of appropriate competition, or justification for use of nationally-known or highly-specialized experts that may be required should be referenced here. These supporting materials would normally be included in the plan as appendices or provided separately under cover letters.

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Period of Performance: 15 working days

<i>Labor Requirements:</i>		<i>Days</i>
0001A	Senior Analyst/Principal Investigator	3
0004A	Management Analyst	2
0010A	Clerk Typist/Word Processing Operator	2
-----	-----	-----
Labor	Total Days	7

COSTS:

Labor	\$ 2,300
Video-Based Instructional Products	0
Computer-Use Time Estimate	0
Other Separate Items	\$10,400
Travel Estimate	\$ 5,300
-----	-----
Subtotal	\$18,000
OPM Project Management	\$ 2,700
-----	-----
TOTAL TASK COST	\$20,700
	=====

Notes on Resource Estimates:

- Days of labor by contract labor category are to reflect vendor's expectation of actual whole days to be spent on a task. Do not increase the number of days of labor to accommodate the higher daily rates of a sub-contractor.
- Reimbursement for travel of employees of the vendor and its sub-contractors only is provided for under the terms of the contract. Prevailing rates (per diem, mileage, use of common carrier, allowances, miscellaneous expenses, etc.) are

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prescribed in the Federal Travel Regulations which authorize reimbursement for travel costs. Vendors are expected to thoroughly familiarize themselves with these regulations as they apply to anticipated travel. Some important elements pertaining to travel are that:

- Travel must be authorized in advance by OPM work order. All travel work orders issued on or after March 1, 1994, will be firm, fixed-price orders.
- Travel estimates should be reasonably accurate and your costs should be based on the best information available when the plan is prepared. The total travel estimate should include G&A at the applicable rate (include in the total cost, but do not list as a separate line item).
- Number of trips and number of days, departure and arrival points, mode of transport, etc., are to be shown in advance. This information should be provided in an appendix to the management plan, or by separate letter (see attachment).
- Typically, different rules apply to travel within the continental United States than apply to travel outside it.
- Receipts and supporting documentation are no longer required to be submitted with a travel invoice. However, invoices should show travel cost and G&A charges (along with the appropriate rate) as separate line items on the invoice.
- Telephone charges require explanation of their validity (*ie.*, related to purchase order), or in other words, business only.
- Teleconferencing in lieu of travel requires a comparison of costs that would be incurred if teleconferencing is used relative to the costs that would be incurred if the travel option were used. Total costs, including time spent by government as well as by vendor employees, should be considered in this analysis.
- OPM project managers require detailed information about travel requirements to draft the necessary task orders authorizing specific trips. A Travel Pricing Proposal worksheet must be submitted prior to the actual travel. Allow sufficient time for review and fair and reasonable price determination and negotiation, if necessary. Firm, fixed price orders will be issued in accordance with Section G.2i of the contract.

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- Video-Based Instructional Products
 - Accurate estimating of video production costs is not feasible until completion of scripting. When an approved script is ready, a revised plan will need to be submitted, including a video production proposal (see attachment).
 - Travel for video production, from the point of a finished script on, is part of the video production costs and should be included in the video pricing proposal. Such travel is part of a fixed-price item and is not reimbursed on actual-cost-incurred basis. Detailed information on number of trips, days, transport costs, etc., should be provided as part of that proposal.
- Other Separate Items category generally provides only for purchase of those items specifically listed for this category in the contract. A pricing proposal must be submitted.
 - Purchase, lease or rental of PC's is generally not provided for. An exception may be made when the development of courseware requires development and testing in a particular hardware and software environment. In such cases, lease of a small number (*e.g.*, one to three) PC's as developmental work stations is allowed under the contract category "Other Separate Items". A pricing proposal indicating lease prices quoted, mark-up if any, and a lease versus buy comparison if appropriate, is needed to support any such costs included.
 - The provision of highly specialized or nationally recognized experts, in the rare circumstance that they are required should be supported by narrative explaining why expertise outside the normal labor categories is required for this project. Like other separately-priced items, a pricing proposal reflecting appropriate competition and/or pricing basis is required.
- Computer Use Time generally provides for the rental of time on a mini-computer or a mainframe computer. Related costs such as storage fees for files on such a system are also included. A price proposal indicating the basis for charges must be submitted. **It should be noted that these costs are on an estimated basis, reimbursement will be for actual costs incurred as documented by receipts.**

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VII. COST SCHEDULE

Use:

The Cost Schedule:

- Provides a concise view of the total cost of each task and the project as a whole
- Facilitates communication when time is important

Requirements:

The Cost Schedule is:

- A task-by-task tabular display of costs by contract category and in total for each task and the total for all tasks (see attachment).

A payment schedule is to be included in the management plan linking partial payments to identifiable deliverables. For those tasks which require a significant period of time to accomplish, payments which are linked to such events as the accomplishment of discernible milestones, segments, or sub-tasks of the identifiable deliverable may be requested.

VIII. TIME SCHEDULE

Use:

The Time Schedule:

- Provides a graphic view of project timelines
- Identifies concurrency between tasks
- Can highlight project milestones and review points

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Requirements:

The Time Schedule is:

- A task-by-task graphic display of performance times and scheduling for each task relative to project start time.

IX. ADMINISTRATIVE INFORMATION

Use:

This section facilitates the OPM Project Manager's liaison functions with both the contractor's project manager and the client agency's point of contact.

Requirements:

The Administrative Information Section will contain:

- Contractor's project manager name, phone number, and fax number
- Client agency's project manager name, phone number, and fax number
- OPM's project manager name, phone number, and fax number
- Names and resumes of key members of the project team are to be submitted with the plan. Resumes are not required for lower priced labor categories. Neither are resumes required for high priced categories for people who will spend only a small portion of their time on the project, unless they add up in total to a significant portion (*ie.*, more than 25%) of task labor requirements.
- List of sub-contractors to be used

Note: The contractor must submit with each management plan, for OPM review and approval, resumes of key subcontractor personnel and in-house personnel who will be assigned to accomplish the tasks of each purchase order. Any changes in these key personnel from the time of submission of the Management Plan to the completion of work must be submitted to the OPM Project Manager for approval.

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X. QUALITY ASSESSMENT SURVEY

Use:

The Quality Assessment Survey is designed to collect feedback from OPM's client agencies. The survey also is used to document the client's acceptance of the plan deliverables. The OPM Project Manager may determine the final acceptance of the project deliverables based upon the client's approval documented on the survey form.

The survey form should appear as an Attachment to the Management Plan. A camera-ready copy of the form and WordPerfect 5.1 file can be obtained from the Training Assistance and Organization Development Division.

XI. GENERAL GUIDANCE

Outline structure for tasks should use arabic numbers (*e.g.*, the first task is 1, second 2, etc). The ordering level is intended to be the task level. Hierarchical grouping of tasks into phases, projects, etc, may be shown in summary tables, but task detail information should only be displayed for the task or ordering level.

Each page of the Management Plan, except the title page, should be titled, dated, and numbered in arabic numbers. The title page should not be numbered. Each added page should be numbered as an addendum. Revisions should be clearly identified (*e.g.*, on different color paper, in italics, by marginal notation, shading or highlighting, etc.).

All management plans are to be three-hole punched. Additional binding or packaging may be required to satisfy the agency or OPM project manager. Their preferences for stapled, edge bound, or notebook binders should be determined prior to delivery.

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ATTACHMENTS:

**QUALITY ASSESSMENT SURVEY
VIDEO PRODUCTION PROPOSAL
COST SCHEDULE
TRAVEL REQUIREMENTS EXAMPLE
TRAVEL COST PROPOSAL**

OPM TRAINING MANAGEMENT ASSISTANCE QUALITY ASSESSMENT SURVEY

OPM Project Code: _____ Project Title: _____

Instructions: Please complete this survey form. The information you provide will be used to improve the quality of services provided to OPM client agencies. This survey also is used to document your final acceptance of the project deliverables. The survey form should be returned within 15 days of the project completion. Thank you.

OPM PROCESS AND PROJECT MANAGEMENT

1. In the planning, management, and execution of the project, OPM:
 (3) Made a substantial contribution to the project's success.
 (2) Made a contribution to the project's success.
 (1) Made little contribution to the project's success.

2. The actions OPM took to ensure the quality of deliverables were:
 (3) More than Adequate (2) Adequate (1) Not Adequate

3. The financial and project status information provided by OPM was:
 (3) More than Adequate (2) Adequate (1) Not Adequate

4. In communicating with agency personnel, was OPM accessible or did OPM return calls in a timely manner?
 (3) Always (2) Sometimes (1) Never

5. Was OPM an effective liaison between the client agency and the contractor?
 (3) Always (2) Sometimes (1) Never

6. Was OPM's involvement in this project professional, helpful, and appropriate to the agency's needs?
 (3) Always (2) Sometimes (1) Never

Please add any comments below that will explain the reasons for your ratings. (Use the back of this page, if necessary.)

OPM TRAINING MANAGEMENT ASSISTANCE QUALITY ASSESSMENT SURVEY

OPM CONTRACTOR'S ABILITY TO MEET AGENCY EXPECTATIONS

1. Was the management plan responsive to the Statement of Work and to the agency's needs? (2) Yes (1) No

2. Did the management plan include a clear description of:

- The tasks to be performed? (2) Yes (1) No
- The products to be delivered? (2) Yes (1) No
- The required resources? (2) Yes (1) No

3. The products delivered (based on what was described in the management plan):

- (3) Exceeded agency expectations.
- (2) Met agency expectations.
- (1) Did not meet agency expectations.

4. The contractor's staff members:

(2) (1)
YES NO

Communicated openly and were accessible.

Had the skills needed to perform the project tasks adequately.

Monitored the project status and communicated about the project status.

Met established timeframes.

Established effective review processes to elicit agency comments.

Listened fully to agency feedback and reflected it accurately in the products produced.

Took steps to ensure that the agency received good value for the money spent.

Coordinated all parties working on the project (internal staff and subcontractors) to ensure that there was continuity.

Showed a commitment to accomplishing the agency's goals and objectives.

5. Overall, was the contractor's involvement in this project professional, timely, and appropriate to the agency's needs?

(3) Always

(2) Sometimes

(1) Never

Please add any comments below that will explain the reasons for your ratings. (Use the back of this page, if necessary.)

VIDEO PRODUCTION PROPOSAL

Contractor _____ Date _____

Project Title _____ Project Code _____

Production Title _____

Approximate Length in Minutes _____ Total Cost \$ _____

COST ITEM	UNITS	RATES	TOTAL
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TAPE AND FILM STOCK	Number		
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Betacam
M-II
1" Tape
VHS
Black and Coded D2
Audio Tape 1/4"
Audio Tape 1"
Digital Audio Tape

DUPLICATIONS AND TRANSFERS	Number		
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Time Coded Window Burns
VHS Duplication
Film to Tape transfers
1" Type C Duplication
3/4" U-Matic Duplication
Beta Duplication
Beta duplication for stock
35MM Slide (per frame)
Stock Footage (per minute)
Other (specify)

GRAPHICS AND ANIMATION	Hours		
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Digital Effects
Wavefront
Storyboards
Other (specify)

VIDEO PRODUCTION PROPOSAL

COST ITEM	UNITS	RATES	TOTAL
PRODUCTION EQUIPMENT	Days		
Camera/Recorder			
Beta Deck			
Lights			
Dolly/grip			
Set/props			
Audio Equipment			
Radios			
Teleprompter			
Other (other)			
MUSIC/AUDIO PURCHASES AND SERVICES	No/Hrs		
Sound Effects			
Needle Drops			
Music/Sound Effect Selection			
Opus Audio w/ Video			
Audio w/o video			
Video Layback			
Audio Transfer	:	:	:
Narration Recording			
Music to DAT			
Audio Sweetening			
Other (specify)			
VIDEO POST PRODUCTION PURCHASES AND SERVICES	Hours		
(Specify on-line or off-line)			
Edit Suite 1"			
Edit Suite D2			
Special Camera Mount			
Digital Effects			
Digital Frame Store			
Additional 1"			
Color Correction Process			
Electronic Graphics			
Other (specify)			

VIDEO PRODUCTION PROPOSAL

COST ITEM	UNITS	RATES	TOTAL
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VIDEODISC MASTERING

Units

Mastering (per disc)
Check disc (per side)
Relication
Other (specify)

TECHNICAL CREW

Hours

Producer
Production Assistant
Director
Videographer
Lighting Director
Make-up Artist
Teleprompter Operator
Audio Technician
Gaffer

OUTSIDE TALENT

(Specify Union or Non-Union)

Spokesperson
On-Camera Talent
Voice-over Narrator
Extras
Wardrobe Charge

SUPPORT SERVICES

Units

Van and driver rental
Travel, Local (miles)
Travel, Not local
Courier/Delivery Charges
Food for crew/talent

Detail of Travel Requirements:

COST SCHEDULE

Task Title	Labor	Video Production	Computer Use Time	Sep-Priced Items	Travel	Subtotal	OPM Management	Total Cost
1. Conduct Job Task								
2. Assess Training Needs								
3. Develop Objectives								
4. Develop Course Design								
5. Develop Prototypes								
6. Draft Course Materials								
7. Test, Evaluate, Revise								
Total Cost of this Plan								

TRAVEL COST PROPOSAL

Contractor: _____ Date: _____

Description: _____

Project Code: _____ Project Title: _____

Actual Travel Dates: _____

Number of Trips	From	To	Per Diem Days	Per Diem Rate	Total Amount
Air Fare					
Train, Bus, etc.					
Rental Car					
POV Costs					
Misc Expenses					
Other (Specify)					
Travel Sub-total					
Add: G&A Charges (Show percentage)					
Total Travel Cost					

NOTES: _____
