Project Planning and Management (PPM) V2.0
User Guide

Planning Phase
Version 1.0
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Contents

1. How Did We Get to the Planning Phase?

Before the Planning Phase can begin, the IT Project Manager (IT PM) assigned to the project must have submitted the Project Initiation Form (PIF) for review and acknowledgment by the Business Lead, Customer Relationship Coordinator, and Technical Review Sub-committee (TRC) Chair. After receiving acknowledgment of the project's initiation, the team performs the tasks and activities within the Initiation Phase, which concludes with a Project Validation Review control gate meeting. At this review, TRC members determine if the project should proceed with project planning activities and the development of detailed business requirements. Once approved, the project can then start the Planning Phase.

2. Planning Phase Overview

2.1 Planning Phase Description

In the Planning Phase the integrated project team (IPT) decides whether to modify and/or enhance an existing system, custom develop a new solution, install and configure a commercial or government off-the-shelf capability, or utilize a service provided by an external commercial or government entity to meet the identified business needs. The team may also procure resources per the Acquisition Strategy or Procurement Management Plan for the requirements activities or Planning Phase activities only. It may also procure support for the entire project life cycle through deployment.

During the Planning Phase, the IPT develops a concept of operations and then gathers and documents detailed business and functional requirements supporting it. The team also develops a detailed Project Schedule for the project. A high-level Solution Architecture document is created and approved and other relevant project management planning activities are documented. The project baseline is established and approved at the Planning Phase control gate review, called the Project Baseline Review.

In addition, during the Initiation Phase or at the beginning of this phase (and approved separately), the specific route through the rest of the PPM Life Cycle is determined using the Project Tailoring Agreement (PTA), which includes the development methodology and acquisition approach.

Once the phase tasks and activities are completed and the resulting deliverables are created, the IT PM compiles them into a Planning Phase package and submits it to the TRC for the Planning Phase control gate, the Project Baseline Review.

2.2 Planning Phase Process Flow

Note: Process not representative of typical Decommission project type (activity P-13 not depicted in process flow)

3. Planning Phase Key Activities and Descriptions
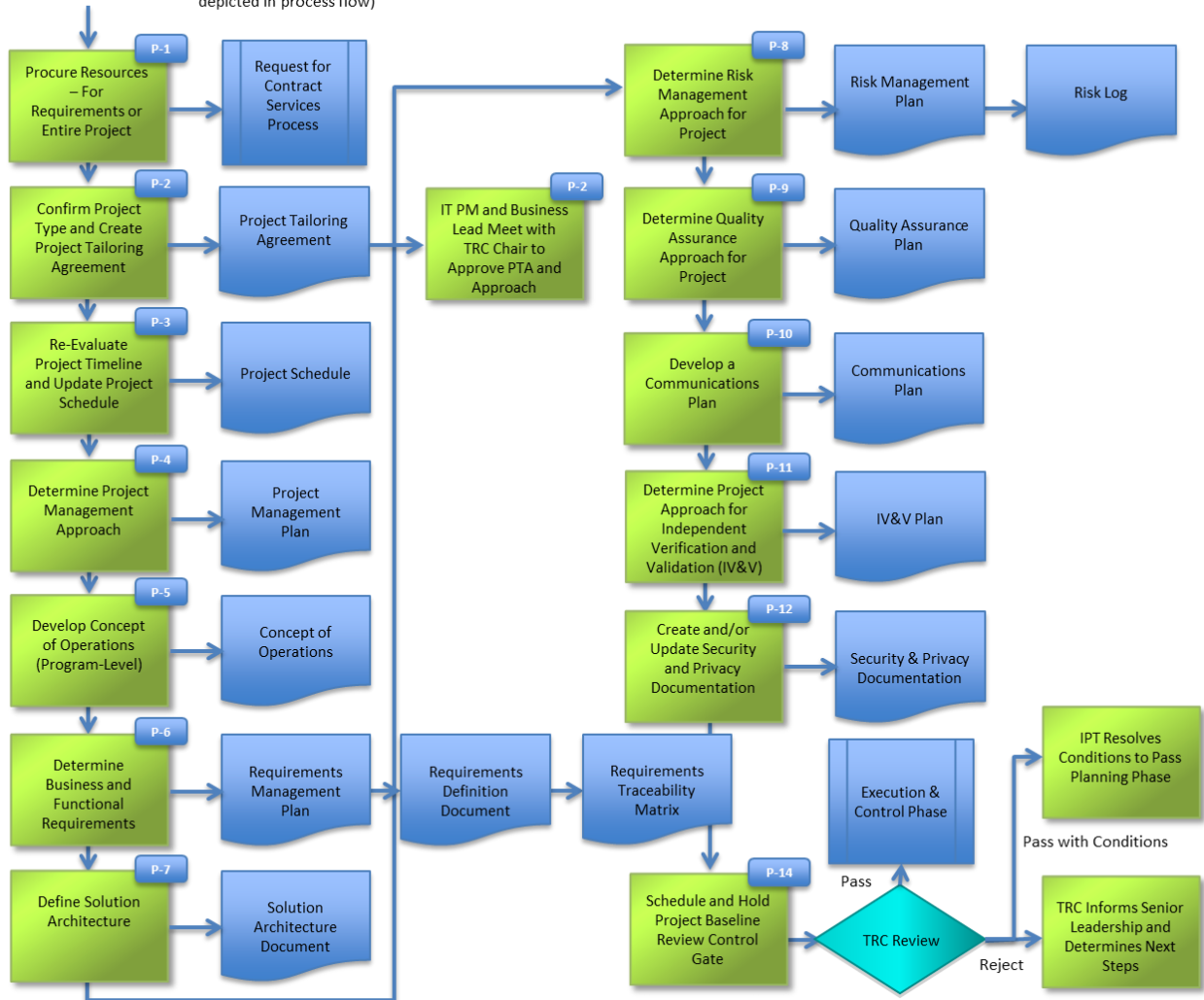
Planning Phase activities depict the probable tasks that project teams will perform across most project types. PPM templates are where the output of the work performed by the IPT and any associated vendor support is documented. The following key activities summarize the work that is performed in the Planning Phase.

- **P-1 Procure Resources per the Acquisition Strategy (for Requirements or Entire Project)**
  Methods of procurement of resources for this phase or the entire project may vary by project type and should be outlined in the Acquisition Strategy (for major systems/programs) and the Procurement Management Plan. This activity consists of the following:

- o   Referencing the Acquisition Strategy and Procurement Management Plan for the approach
- o   The IT PM requests that the project be assigned a government technical representative (GTR) and/or government technical monitor (GTM) to the project.
- o   The GTR or GTM, with the help of the IPT, prepares the Request for Contract Services (RCS) package for work that is to be completed.
- o   If contract resources are to be used in the Planning Phase, the RCS Package is completed prior to any further progress in the Planning Phase.
- o   The RCS Package (including the statements of work, life cycle cost estimate and identified contractor team skills) is passed on for review and approval signatures.
- o   The involved stakeholders then negotiate and approve the contractor proposals following the steps in the Federal contracting guidelines and task order guidelines.
- o   When a proposal is accepted, it is sent to the Office of the Chief Procurement Officer (OCPO), GTR/GTM, and the contractors to be signed.
- o   Once signed, the OCPO representative and GTR/GTM use the instructions found in the Federal contracting guidelines to issue the task order(s).
- o   If the project is following a SaaS Project Type and using an Interagency Agreement (IAA), the steps may differ. Refer to the SaaS Project Type Guide for more information.

Note: The Procurement Management Plan completed in the Initiation Phase describes how a project team will acquire goods and services from outside of HUD. Information within this document can be used as an input when completing the specific Acquisition Plan for each contract.

- **P-2 Choose Project Type and Create Project Tailoring Agreement (PTA)**
  In PPM V2.0, the Office of the Chief Information Officer (OCIO) has introduced five project types. At this point, since consideration of alternatives was done both in pre-PPM activities as part of budget formulation and during the Initiation Phase, the IPT should be confident on the specific project type that will be followed. The IT PM accesses the PTA for the project type selected via the PPM V2.0 website and reviews and tailors it in conjunction with the Business Lead and IPT members. This document needs to be reviewed and approved by the TRC Chair as early as possible in the Planning Phase (separate from the control gate review) to ensure expectations and assumptions are in alignment.

- **P-3 Re-Evaluate the Project Timeline and Update the Project Schedule**
  Due to the fact that initial project timeline estimates were provided in many cases more than twelve months prior to the start of the project, many dates and assumptions are no longer valid. The Planning Phase is where a more confident project cost and schedule baseline should be established. In this activity, and since in most cases contractor support for the requirements gathering activities is likely on board, the joint team should re-evaluate the project timeline and update the Project Schedule accordingly. The IT Project Manager (IT PM) will need to work with his/her touch-point in the capital planning and investment control (CPIC) function to determine HUD-required re-baseline tasks to follow should substantial changes occur.

- **P-4 Determine the Project Management Approach**
  The IT PM along with the Business Lead will have the responsibility of determining the project management approach which is documented in the Project Management Plan (PMP). A PMP defines, among other things, how the project is to be executed and controlled. GAO has reported that agencies need to develop comprehensive project management plans, and leading practices emphasize the importance of having a plan in place that, among other things, establishes a complete description that ties together all activities and evolves over time to continuously reflect the current status and desired end point of the project. To be effective, a PMP integrates cost and schedule baselines from planning activities and consolidates subsidiary management plans.

  Components of a PMP include: schedule management, cost/project budget management, scope and change management, quality assurance, human resources management, communications and stakeholder management, risk management, procurement management, process improvement, and requirements management.

  Note: With some project types, the content of the subsidiary management document may be incorporated into the PMP in lieu of a separate subsidiary management document.

- **P-5 Develop the Concept of Operations (at the Initiative- or Program-Level)**
  A Concept of Operations (CONOPS) depicts high-level requirements that provide a mechanism for users to describe their expectations of the solution. The CONOPS is used as an input to the development of formal testable system and software requirements specifications. A CONOPS provides the most value when depicting the integrated solution. So, if a program area is implementing a large system via a program which contains multiple projects within it, it would be expected that the CONOPS be produced at that program level to show how the entire system and its parts would operate.

- **P-6 Determine Business and Functional Requirements**
  In this activity, the project's detailed business and initial functional and technical requirements are created and reviewed. This work is the basis of the Planning Phase and when most think of the Planning Phase, most think of the development of business, functional, and technical requirements. The Requirements Lead, in conjunction with the Business Lead, IT PM, and any additional IPT members, determines the project's business, functional and non-functional requirements. The participants use the information in the issued task orders, statement(s) of work, and the approved Project Charter to assist in identifying the requirements. They also will use end user requirements gathering sessions as an input channel as well as the Concept of Operations information.

  In addition, the Requirements Management Plan is used to document the information necessary for effectively managing project requirements from definition to delivery.

  The IT PM and Business Lead assist the Requirements Lead who uses the business, functional, and non-functional requirements to create and update the requirements artifacts (Requirements Definition document and Requirements Traceability Matrix).

- **P-7 Define the Solution Architecture**
  HUD applications must be in alignment with HUD's Enterprise Architecture. In this activity, the solution architecture will depict the initial and future relationship between the current solution and HUD's architecture. The resulting output ensures that the solution architecture is in compliance with HUD enterprise architecture principles, best practices, and conceptual target application architectures. The target state includes business, enabling, and support services that are either re-used from the current portfolio, leveraged from existing enterprise services, or established as new services via projects to develop them. The Enterprise Architecture Lead, Lead Solution Architect, and IT PM will likely all determine how to develop and what to include in the solution architecture, as it ultimately will be reviewed by the Chief Architect at the Planning Phase control gate review meeting.

- **P-8 Determine the Risk Management Approach for the Project**
  Project risk management includes the processes of conducting risk management planning, identification, analysis, response planning, and controlling risk on a project. In this activity, the IT PM, Business Lead, and Enterprise Architecture Lead describe at a high-level how the project will:

  - Conduct risk management activities
  - Determine which risks may affect the project
  - Prioritize risks for further analysis or action by assessing and combining their probability of occurrence and impact
  - Analyze the effect of identified risks on overall project objectives
  - Develop options to reduce threats to project objectives
  - Control risks (risk response plans, risk tracking, identification of new risks)
  - Complete the Risk Log

- **P-9 Determine the Quality Assurance Approach for the Project**
  The purpose of this activity is to specify and document the quality assurance activities and responsibilities for ensuring that the project meets the user requirements and conforms to HUD's Information Technology Management (ITM) Framework. In this activity, the IT PM defines the project's quality policies, procedures, areas of application, and associated criteria. He/she documents the quality management approach including the quality objectives and standards, methods and tools, and roles and responsibilities. The IT PM also describes the operational techniques and activities that the team will use to provide quality assurance, including identification of the assessments, reviews, and audits that will be conducted, the process for quality analysis, how quality will be determined and measured, and how corrective actions will be handled. The IT PM should consult with the Business Lead, Testing Lead, and IPT when determining the quality assurance approach.

- **P-10 Develop a Communications Plan**
  The purpose of communications planning is to define the communications goals and strategies of the project. Its overall objective is to promote the success of a project by meeting the information needs of project stakeholders and outline the goals of the communications efforts to reach and inform each group.

Communications management is how a project provides guidance and information on managing stakeholder expectations. The IT PM and Business Lead need to discuss how, when, and by whom information about the project will be administered and disseminated and describe:

- Stakeholder communications requirements
- Information to be communicated
- Reason for distribution of information
- Person or groups who will receive information
- Escalation processes

They should also define the processes and techniques the project will utilize to effectively engage stakeholders in project decisions and execution based on the analysis of their needs, interests, and potential impacts. In addition, the IT PM and Business Lead should consult with the CRC, IPT, Project Sponsor, and program area stakeholders when developing the Communications Plan.

- **P-11 Determine the Project Approach for Independent Verification and Validation (IV&V)**
  Software validation ensures that the solution actually meets the client's needs, and that the specifications were correct in the first place, while software verification ensures that the solution was built (or is being built) according to the requirements and design specifications. Validation answers the question, "Are we building the <u>right product</u>?" Verification answers the question, "Are we building the <u>product right</u>? Maintaining independence of the verification and validation processes is an essential element of the IV&V process. In this activity, the IT PM and Business Lead define the project approach for IV&V.

  PPM V2.0 defines IV&V as a rigorous independent process that evaluates the correctness and quality of the project's solution to ensure that development is in accordance with customer requirements and well-engineered. It recognizes that IV&V partnerships provide high value to many projects and can be introduced at any phase of a project as determined by the project's sponsorship and/or governance requirements.

  Currently at HUD, IV&V guidance is being revised. When the new guidance is finalized, this content will be updated to reflect new requirements.

- **P-12 Create and/or Update Security and Privacy Required Documentation**
  In this activity, the project's initial security and privacy measures are created, updated, reviewed, and approved. The IT PM, IT Security Specialist, and Privacy Lead are responsible for ensuring the information provided is valid across the items. The need for each item will vary by project type and are described below:

FIPS 199 *Note: This requirement may vary depending on the categorization and type of information in the system. Security IPT members will help determine if this artifact is needed based on the particulars of the solution.*	FIPS Publication 199 defines three levels of *potential impact* on organizations or individuals should there be a breach of security (i.e., a loss of confidentiality, integrity, or availability). The application of these definitions must take place within the context of each organization and the overall national interest.

Initial Privacy Assessment *Note: This requirement may vary depending on the type of information in the system. Privacy IPT members will help determine if this artifact is needed based on the particulars of the solution.*	An Initial Privacy Assessment (IPA) is a required document designed to assess whether a Privacy Impact Assessment (PIA), a Privacy Act system of records notice (SORN), and/or other related privacy documents are required. The responses to the IPA will provide a foundation for both a PIA and a SORN should either or both be required, and will also help to identify any policy concerns.
System of Records Notice *Note: This requirement may vary depending on the type of information in the system. Privacy IPT members will help determine if this artifact is needed based on the particulars of the solution.*	This document may or may not be needed based on the answers to the IPA. A System of Records is a group of any records under the control of any agency from which information is retrieved by the name of the individual or by some identifying number, symbol, or other identifier assigned to the individual. The Privacy Act requires each agency to publish notice of its systems of records in the Federal Register. This notice is critical to the production of the system, and is generally referred to as a system of records notice (SORN).
Privacy Impact Assessment *Note: This requirement may vary depending on the type of information in the system. Privacy IPT members will help determine if this artifact is needed based on the particulars of the solution.*	This document may or may not be needed based on the answers to the IPA. Any new system that will contain personal information on members of the public requires a PIA, per OMB requirements (this covers both major and non-major systems).

- **P-13 Plan the Decommissioning Approach (if applicable)**
  This activity would occur for the Decommission Project Type. Decommission planning includes addressing how the various components of the solution will be handled at the completion of operations, including software, data, hardware, communications, and documentation. The deliverable, or Decommission Plan, also notes any provisions for future access to the solution's components particularly the data. The plan is forwarded to appropriate management personnel and stakeholders for review and approval.

  An important component of the plan involves stakeholder notification and communications. The project team needs to plan for notifying known users of the asset being shut down and other affected parties, such as those responsible for interfacing systems/solutions and operations staff members involved in running the asset. It also asks about procedures for coordinating with solutions and organizations that consume any data or services from the retiring asset or provide data or services to the asset.

  At a minimum, contents of the communications should include:
  - The rationale for disposing the solution
  - The plan to archive data and/or transfer of functionality if some is to be retained
  - The tentative timeline for disposition

- **P-14 Schedule and Hold the Project Baseline Review Control Gate**
  In order to pass through the Planning Phase to the Execution & Control Phase, a project team needs to receive approval from the TRC through a control gate. During this activity, the IT PM schedules a control gate review meeting using the TRC's scheduling process. The lead time on this effort is approximately two weeks which should be built into the project schedule lead

times. The two weeks provides the TRC members the chance to review the work completed and prepare comments ahead of the meeting. During this activity, the IT PM should also ensure all deliverables are signed and reviewed by the proper team members prior to submission.

4. Project Type Differentiators

Planning Phase differentiators may exist based on the type of project the team is following to achieve the desired solution. The table below summarizes where differences exist by project type.

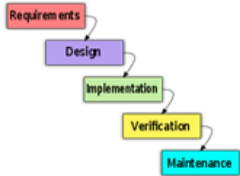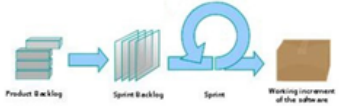| PPM V2.0 Project Type	Planning Phase Differentiators
Modifications/Enhancements to Existing System	Many opportunities exist to consolidate content into fewer deliverables based on the nature of the modifications and/or enhancements. For this project type, a matrix is used to classify the projects by project cost and by a summary level (high, medium, low) classification of project complexity, project risk, and mission criticality. Based on where the project falls, different guidance is offered. For example, for lower risk/cost projects, the Requirements Traceability Matrix can be used in lieu of a Requirements Definition document to track the modification and/or enhancement requirements. For larger, more complex projects of this type, projects should document those requirements using the Requirements Definition document. Also, for the solution architecture work, most likely the project team would refer to any existing solution architecture content and edit it appropriately as opposed to starting from scratch.
Custom Development	The Project Management Plan (PMP) serves as the primary source of information for planning, executing, monitoring, controlling, and closing a project. It provides detailed plans, processes, and procedures for executing, managing, and controlling the project life cycle activities. It provides necessary information to improve the level of communication and understanding between all project team members and stakeholders, and may consist of other subsidiary management documents.
	With some project types, the content of the subsidiary management document (e.g., communications management plan, risk management plan) may be incorporated into the PMP in lieu of a separate subsidiary management document. Based on the scope, size, complexity, and timeline of a custom-developed solution, this opportunity may exist as well, but should be reserved only for small development efforts with very fast deployment timeframes.
Commercial-off-the-Shelf/ Government-off-the-Shelf (COTS/GOTS)	A CONOPS depicts high level requirements that provide a mechanism for users to describe their expectations of the solution. The CONOPS is used as input to the development of formal testable system and software requirements specifications. A CONOPS provides the most value when depicting the integrated solution.

	Relevant content from the Concept of Operations (CONOPS) PPM template can be included as an initial section of the Requirements Definition document if the project itself makes up the entire system implementation as opposed to a large program containing individual projects. In addition, following the description in Custom Development on the PMP, some content can be incorporated into the PMP for a COTS/GOTS Project Type if desired. Use good judgment when making this decision – if the COTS/GOTS solution has a high mission criticality or is a large effort cost-wise, it is important to consider retaining some of the documents as subsidiary management documents. Also reference the initiative- and program-level guidance; if content can be created at a higher-level and leveraged by sub-projects, then obviously the content would not be a candidate for inclusion in the PMP as a tailoring option. The content that can potentially be included in the PMP is: • Communications Management • Risk Management • Requirements Management • Quality Assurance
Software-as-a-Service (SaaS)	Similar to the COTS/GOTS approach, relevant content from the Concept of Operations (CONOPS) PPM template can be included as an initial section of the Requirements Definition document. In addition, following the description in Custom Development on the PMP, some content can be incorporated into the PMP for a SaaS Project Type if desired. Use good judgment when making this decision – if the SaaS solution has a high mission criticality or is a large effort cost-wise, it is important to consider retaining some of the documents as subsidiary management documents. Also reference the initiative- and program-level guidance; if content can be created at a higher-level and leveraged by sub-projects, then obviously the content would not be a candidate for inclusion in the PMP as a tailoring option. The content that can potentially be included in the PMP is: • Communications Management • Risk Management • Requirements Management • Quality Assurance
Decommission	Planning activities for a Decommission project exist solely to plan how the various components of the solution will be handled at the completion of operation; as a result, only a Decommission Plan is expected during the Planning Phase of this project type.

5. Iterative Development Differentiators

Iterative and incremental development utilizes both an iterative design approach and other rapid methodologies for development. The approach has been widely suggested for large development efforts and is currently promoted as the optimal path to take when executing custom development projects in the federal government.

The most popular approaches project teams take when delivering a custom-developed solution include:

	Waterfall	Iterative	Agile
Overview	- Majority of software features delivered in one release at the end (often after 3-12 months) - Sequential process where each stage is completed before proceeding to the next	- Working solution is extended and refined through a set of incremental changes - Multiple releases managed in parallel with each at different points of development lifecycle	- Adheres to basic Iterative principles (e.g., refinement of working solution) - Places even greater emphasis on flexibility and co-development of product with product owner
Key differences	- No scope changes due to sequential execution of development phases - Testing occurs once development is completed	- Scope is flexible but changes do not occur mid-sprint - Testing occurs during defined phase at end of each iteration	- Scope changes occur at any time based on business feedback - Testing is performed continuously during development
When to use	- Large, complex systems with high technical risk - Rollout of new architecture/ replacement of core technologies - Premium quality prioritized over predictable timelines	- Complex development tasks (e.g., front-end applications with numerous user interactions) - Known technology/architecture - Volatile/changing requirements - Fast time to market required	- Numerous, small feature increments - Known technology/architecture - Volatile/changing requirements - Fast time to market required

Source: NGMS Iterative Operating Model and Playbook, July 2013

PPM V1.0 followed a more traditional waterfall approach to custom development. With the changes in the industry, PPM V2.0 has been constructed to account for all three types of development including the more popular iterative and agile approaches.
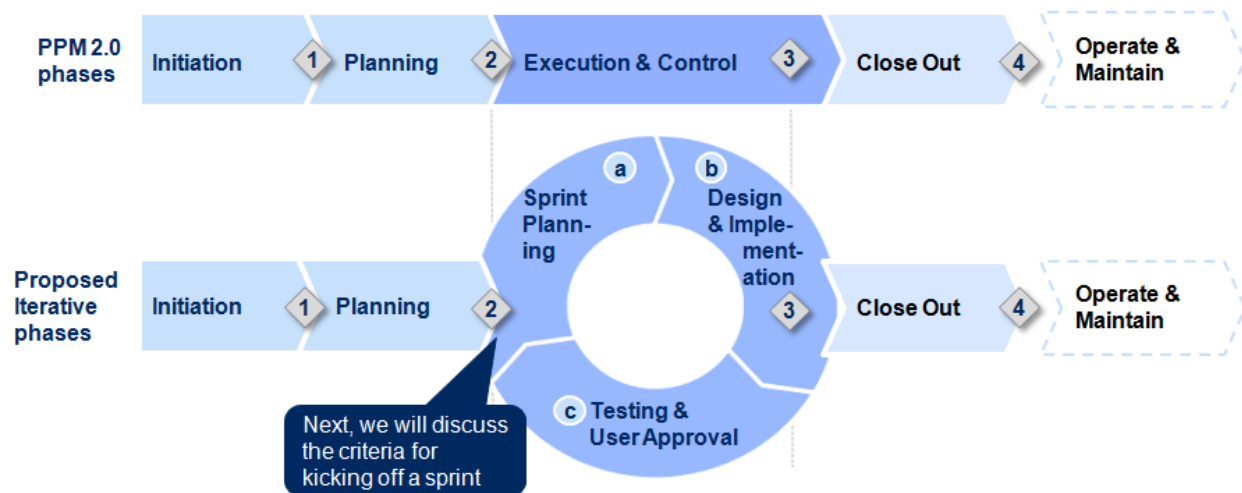
The combination of the PPM V1.0 Design, Execution of Solution, and Deployment Phases into one Execution & Control Phase in PPM V2.0 gives projects the flexibility to tailor with the TRC the amount of times they need to come to a control gate as well as what deliverables are expected at each. In an agile environment, for example, the TRC may want to have control gate check-in meetings at various times throughout the deployment of sprints to check progression.

When a project follows an iterative or agile approach for custom development, the major impact to the Planning Phase is that the Requirements Definition document and Requirements Traceability Matrix will not be final at the Planning Phase control gate. To initiate a development sprint, projects are expected

to have the business requirements mostly final and only initial functional requirements completed. The sprint cycles will help inform when the business requirements can be final as well as the functional and technical requirements. As such, the TRC cannot expect a final version of any requirements deliverable at the Project Baseline Review. The way that a project handles the sprint execution informing the requirements can be outlined in the Requirements Management Plan as well.

In some iterative development projects, IPTs benefit from the use of a prototype. HUD encourages the usage of prototyping if the output can be re-used further in the project life cycle, for example, as a pilot that can be installed in a production environment. More detail on pilots is provided in the Execution & Control Phase User Guide.

The graphics below outline the transition from the Planning Phase to the Execution & Control Phase and show the inputs needed in an iterative or agile approach:

Source: NGMS Iterative Operating Model and Playbook, July 2013

6. Artifact Subject Matter Experts and Signoffs

The following table lists the resulting set of deliverables that may get completed as part of the Planning Phase based on the project type being followed. In addition, it references the actual source template content owner and the artifact-by-artifact signoffs needed before submission for a control gate. The purpose of signoffs is to ensure that the IPT member(s) who are responsible and accountable for the specific functional knowledge support the work effort and resulting deliverable that the work effort produced.

PPM V2.0 Planning Phase Artifacts	Subject Matter Expert (SME)/Template Owner	Signoffs Prior to Control Gate Submission (SME)
Project Tailoring Agreement	OCRPM - EPMD	• IT Project Manager • Business Lead • TRC Chair (Outside of Control Gate)
WBS/Project Schedule	OCRPM – EPMD	• IT Project Manager • Business Lead
Concept of Operations	OCRPM – EPMD	• Business Lead • Enterprise Architecture (IPT) • IT Project Manager
Requirements Definition Document	OCRPM – EPMD	• Requirements Lead • Business Lead • Enterprise Architecture (IPT) • IT Project Manager
Requirements Management Plan	OCRPM – EPMD	• IT Project Manager • Requirements Lead
Requirements Traceability Matrix	OCRPM – EPMD	• Requirements Lead • Business Lead • Enterprise Architecture (IPT) • IT Project Manager
Project Management Plan	OCRPM – EPMD	• IT Project Manager • Business Lead
Quality Assurance Plan	OCRPM – EPMD	• IT Project Manager
Communications Plan	OCRPM – EPMD	• Business Lead • IT Project Manager
Risk Management Plan	OCRPM – EPMD	• IT Project Manager • Business Lead • Enterprise Architecture (IPT)
Risk Log	OCRPM – EPMD	• IT Project Manager • Business Lead • Enterprise Architecture (IPT)
Solution Architecture Document	OCRPM – EA	• Enterprise Architecture (IPT) • Lead Solution Architect • IT Project Manager

IV&V Plan	OCRPM – EPMD	• IT Project Manager • Business Lead
Decommission Plan	IT Operations	• IT Operations (IPT) • Business Lead • IT Project Manager
Security Artifacts	IT Security	• Work with Security IPT member to determine
Privacy Artifacts	Privacy	• Work with Privacy IPT member to determine

Note: All items submitted will require a summary-level signature from the IT Project Manager. If the artifact is a project management document by nature, then it will call out a specific signature required by the IT Project Manager at the artifact level.

7. Program vs. Project Level Artifacts in the Planning Phase

It is important to recognize that some of the outputs of activities performed during a project can be leveraged and implemented at a higher level than the project level. At HUD, this can mean a "program-level" or "initiative-level." Many times teams spend unnecessary efforts producing documentation at too low a level, when in fact, the information can be leveraged at a higher level. The table below outlines artifacts that are appropriate for leveraging across a program or initiative, or even an investment depending on the scale. Be sure to note in the Project Tailoring Agreement when the project intends to leverage an artifact in this fashion.

PPM V2.0 Initiative-Level Candidate Artifacts	Rationale
Concept of Operations	The Concept of Operations (CONOPS) document depicts the overall solution composition and provides a mechanism for users to describe their expectations of the solution. The CONOPS describes how a solution will be used and communicates the high-level characteristics, activities, and structures of a solution to its stakeholders. It is primarily a non-technical document and often serves as the bridge between the concept that motivated the project to begin with and the initiation of technical requirements. If the solution is a large solution/ system with component parts that are set up as independent projects, the CONOPS should focus on describing the operation of the entire system and specify how the component parts operate as part of the larger solution. The information within this document serves as an input for the Requirements Definition and Solution Architecture documents.
Risk Management Plan (RMP)	Risk Management is the process of identifying, assessing, responding to, monitoring and controlling, and reporting risks. The RMP defines how risks associated with the project will be identified, analyzed, and managed. This repeatable process can be applied to projects that make up a larger program or initiative resulting in one approach leveraged

	by all components of a larger program.
Quality Assurance Plan	Similar to a risk management approach, a quality assurance and quality management approach can be defined at a program- or initiative-level and followed by all related projects.
Requirements Management Plan	The Requirements Management Plan documents how requirements management will be performed on the project including how requirements will be analyzed, documented, and managed. This methodology can be devised at a program- or initiative-level and leveraged by the component projects as a cross-program discipline.
IV&V Plan	An IV&V Plan describes the approach for having an independent third party check that the solution/service meets specifications and that it fulfills its intended purpose. A plan for IV&V activities can be prepared at the initiative-level and executed by project.

8. What's Needed for the Next Phase?

Once a project has received a "pass" or "pass with conditions" vote from the TRC for the Project Baseline Review, the project can begin its execution and control activities. In a "pass with conditions" vote, the TRC will determine how and when it would like the project to address the deficiencies identified. One option would be that the project should proceed forward and remedy the issues during the next phase; another option is to require projects to address the deficiencies prior to completing any other project-related tasks and activities.