

PMI Project Management Standards Program Work Breakdown Structure Practice Standard Project Charter

19 June 1999

I. PROJECT TITLE

Work Breakdown Structure (WBS) Practice Standard

II. PROJECT MANAGER

The Project Manager designated for this project is Kim Colenso

III. BUSINESS NEED THE PROJECT IS INTENDED TO ADDRESS

The Work Breakdown Structure (WBS) is an essential technique (or tool) for managing projects. A significant number of practitioners of project management have expressed a need for guidance in developing and using the WBS technique. The WBS Practice Standard is intended to provide guidance useful in the initial generation, further development and application of the WBS in managing projects.

IV. PROJECT DESCRIPTION

1. Characteristics

A. The WBS Practice Standard provides guidelines (e.g. "nuts and bolts", basics, fundamentals, step-by-step usage guide, how it operates, how to do it) that are relevant to project managers and project teams on the generation, development and application of the Work Breakdown Structure.

B. The WBS Practice Standard will not necessarily mirror the life cycle phases of many projects but may be applicable to concept, design, execution and finish during the project.

C. The WBS Practice Standard will not necessarily mirror the knowledge areas within the *PMBOK® Guide*, but will provide sufficient detail and background for one or more of the inputs, tools & techniques and/or outputs. However, to establish a firm relationship to the *PMBOK® Guide*, where applicable or practical, each WBS Practice Standard section or clause shall reference the relevant *PMBOK® Guide* section or clause.

D. The WBS Practice Standard will be consistent with the *PMBOK® Guide*

E. The WBS Practice Standard shall be aligned with or reference other PMI Practice Standards

F. The WBS Practice Standard shall include information on "what" the Work Breakdown Structure is, "why" it is important, "where" it is applicable, "how" it is generated, developed and applied and "when" it should be used.

G. The WBS Practice Standard shall include information that is broadly accepted within the project management community. It is recognized that because projects vary, so may the resulting WBS. Certain principles, however, apply to most projects most of the time.

H. The WBS Practice Standard shall contain examples and templates. Examples shall be included for emphasis and illustration. The examples and templates shall include a discussion of their strengths and weaknesses. A background description may be necessary to put this discussion in the appropriate context. The examples should be aligned with the relevant information in the standard or its appendix and placed in close proximity to that information.

I. The WBS Practice Standard shall contain sufficient explanation of the intent and content of Work Breakdown Structure decomposition to ensure that all expected and necessary project deliverables can be identified and can be managed appropriately.

2. Project Relationship to Business Need

The WBS Practice Standard shall:

A. Encourage a consistent application of the Work Breakdown Structure.

B. Provide guidance for use with any Work Breakdown Structure developed at any phase during the project.

C. Assist individuals or organizations in judging the adequacy of the Work Breakdown Structure decomposition and level of detail.

D. Be written for a target audience including project managers, project personnel, contract personnel, supervision and other project stakeholders who participate in the technical, quality, schedule and financial and other aspects of the management of projects.

E. Strike a balance between Government/Military and commercial content and focus.

F. Be more prescriptive than the *PMBOK® Guide*.

G. Include high level characteristics or checklists that can be used to assess the quality of a Work Breakdown Structure.

V. ADMINISTRATION

1. Progress Report

Progress Reports shall be submitted monthly and include the following information:

A. Work accomplished during the past month.

B. Work expected to be performed during the next month.

C. Deliverables submitted during the past month.

D. Deliverables expected to be submitted during the next month.

E. Work items behind schedule.

F. Plans to recover lost time.

G. Status of milestone events.

H. Identification of critical items.

I. Program (other) Reviews held/scheduled.

J. Physical percent complete.

K. Estimate physical work to complete.

L. Documented tracking of issues, risks and mitigation to closure.

2. Resource Utilization Report

Resource Utilization Reports shall be submitted monthly and include the following information:

A. Budget authorization.

- B. Total cost expended to date.
- C. Estimated expenditures for the next month.
- D. Estimated cost to complete.
- E. Total travel cost expended to date.
- F. Travel forecast for the next month.

3. Conference Call

Biweekly conference calls will be scheduled to discuss project status, issues, plans and any other items as appropriate.

4. Funding Statement

Funding in the amount of US\$5,000 has been budgeted or allocated for this project for the current program budget year. The Project Manager is authorized to: (1) Form the Project Team; (2) Plan The Project and (3) Initiate The Project and (4) Deliver The Project's Product as described in this Charter. PMI Headquarters will provide support in the area of travel and teleconference arrangements, research (if appropriate), identification of potential volunteers, limited administrative/clerical assistance and other requested or appropriate support as resources permit.

The Project Manager's responsibilities with regard to project funding are to not exceed the budgeted/allocated amount, to notify the PMI Standards Program Team when 75% of the budget/allocation has been expended (prior to spending the remaining 25%) and to identify/request additional funds in advance of required need.

For more information, please contact Steve Fahrenkrog, Standards Manager, at sfahrenkrog@pmi.org.

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