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PMI PM Standards Program
Practice Standard for Work Breakdown Structures Update
Project Charter
February 28, 2003

I. PURPOSE OF A STANDARDS PROGRAM CHARTER

A Project Management Institute (PMI)® Project Management (PM) Standards Program (Standards Program) Project Charter formally authorizes a project in the Standards Program. The Charter provides:

- An understanding of why the project is important to PMI
- A statement of the project scope and deliverables
- A description of PMI's and the project manager's (PM's) authority and responsibility

II. THE PROJECT

A. Project Title: *The Project Management Institute Practice Standard for Work Breakdown Structures Update Project (PS-WBS Update Project)*

B. Project Description: Review and update *The Project Management Institute Practice Standard for Work Breakdown Structures (PS-WBS)*, originally published in 2001, so that it possibly can be submitted as an American National Standard (ANS).

C. Project Manager (PM): Eric Norman, PMP

D. Relationship to Other PMI Projects: The document produced by the *PS-WBS Update Project* should be consistent with the equivalent material in the document being produced by the *PMBOK® Guide 2004 Update Project*.

E. Relationship to Other Organizations: *n/a*

III. BUSINESS NEED THE PROJECT IS INTENDED TO ADDRESS

PMI is committed to providing standards for the project management profession that are widely recognized and consistently applied, and is considered a leader in setting project management standards. To ensure the relevancy of a Standard, it must be reviewed periodically, and, if necessary, updated. Therefore, PMI is committed to a five-year refresh cycle for Standards. Also, PMI is committed to submitting Standards, after the first revision cycle, to the American National Standards Institute (ANSI) for approval as an ANS, where appropriate.

IV. PRODUCT DESCRIPTION

A. Product Characteristics

Practice Standards are guides to the use of a tool or technique identified in *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*, with the product of the *PS-WBS Update Project* being a guide to the use of WBS. *The Project Management Institute Practice Standard for Work Breakdown Structures* is the basis for the document to be produced by the *PS-WBS Update Project*. The Standard shall be understood to be

the body of the document, exclusive of the front matter such as Foreword, Preface, and Table of Contents, and the end matter such as Appendices, Glossary, and Index.

The product delivered by the *PS-WBS* Update Project Team shall be a document that:

- Has been reviewed and updated by the *PS-WBS* Update Project Team.
- Is clear, complete, and relevant to defining, developing, and maintaining WBS.
- Includes information that is broadly accepted within the project management community.
- Assists individuals or organizations in judging the adequacy of the WBS decomposition and level of detail.
- Makes reference, where required, to WBS-related documents (e.g. WBS Dictionaries, etc.) so as to enhance the understanding, creation, and maintenance of Work Breakdown Structures.
- Is written for project management practitioners and other stakeholders of the project management profession.
- Is approximately the same length as the 2001 edition, exclusive of front and end matter, which may increase in size to accommodate additional templates and examples.

B. Product Relationship to Business Need

PMI is committed to five-year refresh cycles for Standards. During the refresh cycle, a Standard is reviewed to determine whether it is

- Out-of-date, is no longer representative of accepted practices, and should be withdrawn
- Valid as is, with no (or only editorial) changes required, and should be reaffirmed
- Valid, but needs technical changes to remain current

The PMI Standards Manager, with the Standards Program Member Advisory Group (MAG), has determined that the 2001 edition of *The Project Management Institute Practice Standard for Work Breakdown Structures* has been well-received in the marketplace, so it will not be withdrawn; PMI does not presume to think it produced a perfect document with the first edition, so it should not be reaffirmed as is; therefore, the Standard should be updated to remain current and valid.

Also, after being in the marketplace for five years, the Standards Program considers a Practice Standard a candidate for submission to ANSI for approval as a national standard. The *PS-WBS* will fulfill the 5-year requirement at the end of this revision cycle.

Therefore, the product delivered by the *PS-WBS* Update Project Team shall be a Standard that is:

- Current and valid
- Widely recognized and accepted
- Suitable for submission to ANSI to become an ANS

V. HIGH-LEVEL PROJECT SCOPE STATEMENT

A. Project Scope

Review and validate or update *The Project Management Institute Practice Standard for Work Breakdown Structures*, originally published in 2001. Specific activities include:

- Review the following and determine whether the material will be included or excluded in the new edition, and track the disposition:
 - All material deferred during the development of the 2001 edition of *PS-WBS*
 - All comments and feedback regarding *PS-WBS* that have been received by PMI since publishing the 2001 edition
- Review industry and business process changes, and determine whether the material will be included or excluded in the new edition.
- Review documented methods or approaches for determining completeness, suitability, etc. of WBS, and incorporate material as required.
- Review the document being produced by the *PMBOK® Guide 2004 Update Project*, to determine the changes required to keep the documents consistent; at minimum, the section references will need to be updated.
- Review all text in the Standard to make sure it is clear, complete, and relevant, revising as necessary.
- Review all examples in the Appendices to make sure they are clear, complete, and relevant, then revising, adding, or deleting examples as necessary. Include a discussion of strengths and weaknesses.
- Add templates to the Appendix as necessary, including a discussion of strengths and weaknesses for each.
- Add checklists to the Appendix that can be used to assess the quality of a WBS.
- Track disposition of all Exposure Draft comments, suggestions, and feedback.
- Follow a formal change management process for changes to scope and/or content.

B. Exclusions

- Although the intent is to update the document to continue its relevance and then submit it to ANSI for approval as a national standard, the submittal process is not part of this project.

C. Assumptions

- The main body of the current document is considered a PMI Standard.
- Although the content needs updating, the concepts and structure of the current document are valid and do not need major rework.

- Comments, suggestions, or other feedback that was deferred during the initial development of the Standard, and received since publication, is available for review by the *PS-WBS* Update Project Team.
- The *PS-WBS* Standard is a candidate for consideration as an ANS.

D. Constraints

- The page count of the body of the Standard should remain approximately the same; any significant increase must be documented, justified, and approved by the Standards Program Manager with advice from the Standards MAG.

E. Interim Deliverables

The PM will provide the following interim deliverables:

- Detailed Project Plan, including a Project Schedule that reflects all Interim Deliverables, plus the major milestones shown in Section F below and additional interim milestones that will enable the project team to demonstrate progress.
- Scope Statement for review
- Outline of proposed changes
- Pre-exposure Draft of the Standard
- Exposure Draft of the Standard
- Final Draft of the Standard incorporating agreed-to Exposure Draft comments
- Document showing disposition of all Exposure Draft comments
- Publicity articles for PMI publications

Additional deliverables may be identified during project planning and should be reflected in the Project Schedule.

F. Major Milestones

The expected publication date for the Standard produced by *PS-WBS* is: *December 2005*

The PM is expected to meet the following milestones:

- Form Project Core Team: *April 15, 2003*
- Present Project Plan: *June 15, 2003*
- Submit Scope Statement for revalidation: *September 15, 2003*
- Submit outline of proposed changes, additions, and deletions: *December 1, 2003*
- Submit detailed information on proposed changes, additions, and deletions: *May 1, 2004*
- Provide interim draft to the Standards Manager for MAG review: *September 1, 2004*
- Provide Exposure Draft to the Standards Manager for MAG and Subject Matter Expert (SME) review: *April 1, 2005*
- Complete Exposure Draft comment gathering: *June 1, 2005*
- Complete Exposure Draft comment evaluation: *August 15, 2005*
- Provide Final Draft to the Standards Manager for forwarding to PMI Publishing: *September 1, 2005*

The Project Team should identify additional milestones, including publicity for the document, during project planning, and reflect these milestones in the Project Schedule.

VI. ADMINISTRATION

A. Accountability/Authority

The PM reports to the Standards Manager. The PM will follow the principles in the Standards Program Volunteer Protocol document, and is authorized to:

- Form the project team.
- Initiate the project.
- Plan the project.
- Develop a comprehensive schedule and a cost estimate by quarter.
- Follow established Change Management processes.
- Deliver the project's product as described in this Charter.

The Standards Program Team (SPT), which is comprised of the Standards Manager and the Standards MAG, is responsible for:

- Providing insight/oversight of the execution of the project.
- Discussing the project on a regular basis.
- Reviewing the project with the PM at a MAG meeting at least once each year.
- Determining whether the submitted Standard is ready for the Exposure Draft process, and recommending to the PMI Chief Executive Officer approval/disapproval of the final draft Standard.

B. Funding

1. The Standards Program budget allocation for the *PS-WBS* Update Project in 2003 is:

Additionally, PMI Headquarters (HQ) provides non-allocated project support which includes:

- Arranging travel and teleconferences
- Research (if appropriate)
- Identifying potential volunteers
- Assisting with administrative/clerical tasks (limited)
- Providing Internet resources such as eGroups and/or a Web site for team communications
- Other requested or appropriate support, as HQ resources permit

2. Other funding for *PS-WBS*: *n/a*

3. The Project Manager's responsibilities with regard to project funding are to:

- Provide the Standards Manager, and any other PMI funding entities, an estimate of funds required for the following year by 15 February of the current year.
- Provide an estimate of the funds required for the upcoming quarter by the 15th of the last month of each quarter.
- Stay within the budgeted/allocated amount.
- Identify/request additional funds in advance of required need.

C. Reporting

The PM will report project performance for the preceding month by the 15th of each month to the Standards Manager, using an approved format, focusing on accomplishment of work, variances from planned progress and budgets, and measures for recovery and/or adjustments to plan. The reports should include:

- Progress report
 - Work accomplished during the last month
 - Work expected to be accomplished during the next month
 - Deliverables submitted during the last month
 - Deliverables expected to be submitted during the next month
 - Work items behind schedule
 - Plans to recover lost time
 - Status of milestone events
 - Identification of critical items
 - Documented tracking of issues, risks, and mitigation to closure
- Resource utilization report
 - Budget authorization
 - Total cost expended to date
 - Estimated expenditures for the next month
 - Estimated cost at completion
 - Total travel cost expended to date
 - Travel forecast for the next month
 - Volunteer utilization to date

Prepared by: Julia Bednar, PMP

Date: 02/25/03, revised 07/16/03

Approved by: Steve Fahrenkrog, PMI Standards Manager

Date: *(Enter date approved.)*