

## Recommended Use

### 4.1 Which Templates Should I Use and When?

While the Project Manager may use any combination of templates for the project, the following table provides a guideline for identifying which templates may be most appropriate. The templates are presented in alphabetical order by Process Phase with the checklist listed as the last template within the phase.

Each project's needs will vary, but the table suggests which level of project complexity may typically benefit most from the use of a specific template. The Department of Technology Information Technology Project Oversight Division has created a Complexity Assessment Template that may be helpful in determining the complexity level of a specific project.

To access the templates in a fillable format see the CA-PMF website templates page at the following link: <http://capmf.cio.ca.gov/Templates.html> or by clicking [here](#).

 **Tools**

To access the CA-PMF fillable templates visit the [CA-PMF website](#).

 **Tools**

A template is available: [SIMM 45 - Complexity Assessment \(Oversight\)](#)

## Templates by Process Phase

To access the templates in a fillable format see the CA-PMF website templates page at the following link: <http://capmf.cio.ca.gov/Templates.html> or by clicking [here](#).

Process Phase/ Template Name	Low Complexity	Medium Complexity	High Complexity
<b>Concept Process Phase</b>			
Concept Development and Readiness Assessment Template	X	X	X
Stage 1 Business Analysis Template (PAL) <sup>1</sup>	X	X	X
Concept Process Phase Checklist Template	X	X	X
<b>Initiating Process Phase</b>			
Project Charter Template *	X	X	X
Stakeholder Register Template	X	X	X
RACI Matrix Template *		X	X
Project Priorities Assessment Template	X	X	X
Project Document Approval Template	X	X	X
Project Status Report Template (Oversight) <sup>2</sup>	X	X	X
Initiating Process Phase Checklist Template	X	X	X
<b>Planning Process Phase</b>			
Complexity Assessment Template (Oversight) <sup>2</sup>	X	X	X
Project Management Plan (PMP) Template *	X	X	X
Change Control Management Plan Template		X	X
Change Request Form Template	X	X	X
Change Request Log Template		X	X

Process Phase/ Template Name	Low Complexity	Medium Complexity	High Complexity
<b>Planning Process Phase Continued</b>			
Communication Management Plan Template		X	X
Contract Management Plan Template		X	X
Corrective Action Plan Template			X
Cost Management Plan Template			X
Governance Management Plan Template			X
Implementation Management Plan Template		X	X
Issue Management Plan Template		X	X
Issue Log Template	X	X	X
Maintenance & Operations (M&O) Transition Management Plan Template		X	X
Meeting Agenda and Minutes Template	X	X	X
Procurement Management Plan Template		X	X
Project Organization Chart Template	X	X	X
Quality Management Plan Template			X
Requirements Management Plan Template		X	X
Requirements Traceability Matrix (RTM) Template	X	X	X
Resource Management Plan Template		X	X
Risk Management Plan Template		X	X
Risk Register Template	X	X	X

Process Phase/ Template Name	Low Complexity	Medium Complexity	High Complexity
<b>Planning Process Phase Continued</b>			
Risk Assessment Template (Oversight) <sup>2</sup>	X	X	X
Schedule Management Plan Template		X	X
Scope Management Plan Template		X	X
Skills Assessment Template		X	X
Stakeholder Management Plan Template	X	X	X
Work Breakdown Structure (WBS) Template		X	X
Stage 2 Alternatives Analysis Template (PAL) <sup>1</sup>	X	X	X
Stage 3 Solution Development Template (PAL) <sup>1</sup>	X	X	X
Stage 4 Project Readiness and Approval Template (PAL) <sup>1</sup>	X	X	X
Planning Process Phase Checklist Template	X	X	X
<b>Executing Process Phase</b>			
Deliverable Expectation Document (DED) Template	X	X	X
Work Authorization Template	X	X	X
Process Improvement Plan Template		X	X
Operational Readiness Assessment (ORA)			X
Formal Product Acceptance Template	X	X	X
Sponsorship Commitment Survey Template		X	X
Team Effectiveness Survey Template			X
Executing Process Phase Checklist Template	X	X	X

Process Phase/ Template Name	Low Complexity	Medium Complexity	High Complexity
<b>Closing Process Phase</b>			
Lessons Learned Template	X	X	X
Project Closeout Report Template	X	X	X
Closing Process Phase Checklist Template	X	X	X

\* There are two versions of these templates available. A standard and a mini. The mini is designed for the smaller of the low complexity projects, pilot projects, and those who are exploring a proof of concept. The standard version is for all other projects.

<sup>1</sup>PAL documentation including templates and instructions can be found under the *Statewide Information Management Manual (SIMM) 19* at: <https://cdt.ca.gov/policy/simm-19/>

<sup>2</sup>Oversight templates and other information related to oversight reporting requirements can be found under the *Statewide Information Management Manual (SIMM) 45* at: <https://cdt.ca.gov/policy/simm/>