

Appendix

B

# Project Management Templates



## Appendix B: Project Management Templates



The Project Management Manual makes reference to a number of templates as outputs or deliverables from the processes. Current and future Project Management templates are listed in this section under the Project Management phase where they are typically used, and where it is referenced in the Project Management Manual.

The templates are located on the City of Winnipeg website.

Project Management Phase	Template Name	Acronym	Section
<b>Initiation</b>	Stakeholder Assessment and Communication Plan		4.4
	Project Charter	PC	4.5
<b>Planning</b>	Project Delivery Plan	PDP	5.1
	Project Management Checklist		5.1
	Insurance Requirements Checklist		6.4.6
	Pre-Award Meeting Minutes		9.2.2
	Pre-Construction Agenda and Meeting Minutes		9.2.3
	Basis of Estimate	BoE	5.4.3
	Risk Event Identification Checklist		5.9
	Risk Analysis and Evaluation Register		5.9
	Project Environmental Impact Checklist		5.11.5
<b>Executing</b>	<i>*Team Charter</i>		6.2
	Request for Proposal	RFP	6.4
	Bid Opportunity	BID OP	6.4
	Summary of Bids		6.4
	Award Reports		6.4
	<i>*Letters to Bidders</i>		6.4
	<i>*Progress Estimate (mixed tax, HB)</i>		9.19
	Project Status Report		5.8.5
	Decision Log		5.8.5
	Site Meeting Minutes		9.2.4
	Meeting Minutes		9.2.1
	Inspection Report		9.7.2
	Daily Construction Report	DCR	9.8.1
	<i>*Criminal Record Search Certificate</i>		9.4.8.3
	Major Capital Projects Quarterly Project Status Report		5.8.6



\* Denotes future templates.

## APPENDIX B: PROJECT MANAGEMENT TEMPLATES

Project Management Phase	Template Name	Acronym	Section
<b>Monitor &amp; Controlling</b>	Proposed Change Notice – Construction	PCN	7.2
	Proposed Change Notice - Consultant	PCN	7.2
	Proposed Change Notice Log		7.2
	Request for Information	RFI	7.2
	Request for Information and Response Log		7.2
	Change Control Log		7.2
	Change in Scope of Service	CSS	7.2
	Change Work Order	CWO	7.2
	Field Instruction	FI	7.2
	Field Instruction Log		7.2
	Consultant Progress Report		7.2
	<i>*Training Session Log</i>		9.15
	<i>*Certificate of Satisfactory Classroom Training</i>		9.15
	<i>*Certificate of Satisfactory Field Training</i>		9.15
	<i>*Certificate of Equipment Delivery</i>		9.6.3
	<i>*Certificate of Readiness to Install</i>		9.6.4
	<i>*Certificate of Satisfactory Installation</i>		9.6.4
	<i>*Certificate of Equipment Satisfactory Process Performance</i>		9.6.5
	<i>*Inspection and Test Plan</i>	ITP	9.7.1
	<i>*Non-Conformance Report</i>	NCR	9.7.2
<i>*Non-Conformance Report Log</i>		9.7.2	
<i>*Contract Over Expenditure under \$100,000</i>		7.3	
<b>Close-out</b>	Certificate of Substantial Performance	SP	9.20
	Certificate of Total Performance – Construction	TPc	9.21
	Certificate of Total Performance – Goods	TPg	9.21
	Certificate of Acceptance – Construction		9.23
	Certificate of Acceptance – Goods		9.23
	Project Close-out Report		8.2
	Standard Performance Review for Consultants		8.4
	Lessons Learned		8.6



\* Denotes future templates.