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Project initiation document

Project initiation document (PID)

What is it?

The project management methodology that your organisation uses and the size of your project will determine whether you need a project initiation document (PID) as well as a project charter or project brief. They are similar documents in terms of scope but a PID contains more detailed information.

The PID gathers information needed for the project board to make a decision on whether to go ahead with the project or not. It provides information about the direction and scope of the project and acts as a baseline document against which to assess progress of the project and, ultimately, whether it has been successful or not.

For large projects, the PID is likely to present all the information in full, including the project organisation structure and roles, project controls, quality plan and risk log. For smaller projects, the PID should be a much smaller document. The template overleaf describes a useful PID summary that could be used for small (or larger) projects.

When to use it?

The project lead is usually responsible for developing the PID. The project charter or project brief, once agreed and signed off, is your starting point. It may be helpful to talk to your project board about the level of detail they expect to see in the PID. As it also provides a formal record of the information on which the decision to go ahead with the project was based, the PID must be approved by the project board before the board can be asked to commit any major resources to the project.

How to use it?

The project lead compiles the information within the PID. The key components are typically:

- project rationale
  - background
  - scope and exclusions
  - constraints and assumptions
- project objectives
- costs and benefits
- project approach and work streams
- project plan – indicative timescales
- project management team structure and roles
- risks management.

PID template – see overleaf

What next?

Formal approval to proceed with the project should be sought from the project board.

Figure 1: PID template

Project title:

Project rationale

• Is there a problem the project is seeking to address?

• Is there an opportunity the project is seeking to pursue?

• Will the project meet a need that is currently not being met?

• Is there a legal or regulatory reason for delivering the project?

Project objective

• Given the above, what is the project objective?

Potential benefits

• When the project achieves its objective, what benefits will follow?

• Think about benefits in the following categories:

– Patient benefits

– Clinical benefits

– Organisational benefits

– Staff benefits

– Financial benefits

Potential workstreams

• What changes will the project make?

Risks and issues

• Identify the risks that may impact the successful delivery of your project

Indicative timescales

Scope completed:

Baseline completed:

Design completed:

Implementation completed:

Embed completed:

Project team

Project manager:

Project sponsor:

Clinical champion: