|  |  |  |  |
| --- | --- | --- | --- |
| Project/Tranche/Programme name |  | | |
| Date: |  | | |
| Author: |  | | |
| Document reference: |  | Version: |  |

## Revision History

|  |  |  |
| --- | --- | --- |
| Date | Summary of changes | Version |
|  |  |  |
|  |  |  |

**Approvals**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Version | Date | Approval context | Signature |
|  |  |  | *This document, along with other management plans should be approved in the definition process.* | *The signature of the person giving approval, usually the sponsor. If approval is not being given by the sponsor, the approval context should explain why.* |
|  |  |  |  |  |

**Distribution**

|  |  |  |  |
| --- | --- | --- | --- |
| Distributed to: | Version | Date | Signature |
|  |  |  |  |
|  |  |  |  |

## Policy

|  |  |
| --- | --- |
| Introduction | The introduction will describe the background to the work and make it clear how this document relates to other relevant documents, such as the policies of the host organisation, parent programme or portfolio. |
| Roles and responsibilities | Responsibilities for information management will be widespread since many people will be involved in the management of information in one form of another. However, there must be some core responsibility for ensuring that information is correctly stored, accessed and archived or destroyed.  This will often fall to a support function but on small projects will default to the project manager. |
| Assurance | The criteria for successful information management that will be used in any assurance reviews will be described here. |
| Budget | A separately identifiable budget for information management is only likely where there are complex or unusual information management requirements. |
| Interfaces | All functions are dependent upon information and, therefore, interface with the function of information management. Some specific interfaces may be worth defining, such as how information management related to configuration management, i.e. which documents should be included in a configuration management system and which are subject to simpler policies for version control. |

## Procedure

|  |  |
| --- | --- |
| Collect and create data | This section will define how data will be collected and any specific techniques to be used in creating data. This should ensure consistency across data capture activities in different functions such as monitoring progress and quality control. |
| Document and store information | Duplication of document descriptions in the information management section of other management plans should be avoided. This plan is concerned with establishing consistency across the specific requirements of all other functions. It may set out policies in areas such as formats of paper and electronic documents, secure storage or backup. |
| Access and disseminate | Access may be of particular concern in situations where different levels of security are applied. Members of the management team may need access to some documents but be excluded from access to others.  This section would cover, for example, security clearances or authorisations procedures for access to information. Similarly, it may set out policies for who may receive certain information or who should be notified when information is released. |
| Archive | Superseded documents are usually archived rather than destroyed in order to retain an audit trail of revisions. Once the work is finished, contracts closed and the post project/programme reviews completed, the bulk of delivery information will be archived with anything that remains live being handed over to business- as-usual. |
| Destroy | Most P3 information will conform to organisational standards for the period of storage which will be longer than the duration of a project or programme.  In some cases there may be security or contractual reasons for the management team to have some responsibility for the destruction of information within the life of their work. |