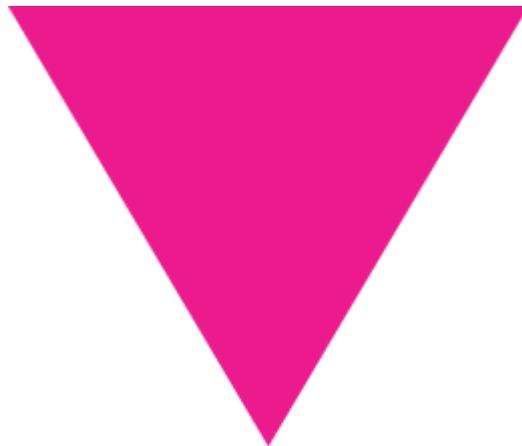




Module Planner Template (MPT)

**Module 4: Planning Phase I: Project Start, Tailoring,
and Management Plans**

**Course Title: Sustainable Project Management with
PM² (SPM²)**



Co-funded by
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Standard Module Planner Template (MPT)

Purpose:

This template must be used by all course authors when designing individual modules. It ensures coherence across the full course by standardizing the structure, terminology, and instructional components. The MPT provides clear guidance for instructors and instructional designers, facilitates alignment with learning outcomes, and supports high-quality delivery across diverse academic and institutional contexts.

Each of the 10 modules in your course must follow this format. Use the provided fields and instructions carefully, and ensure that supporting materials (e.g., templates, videos, practical tasks) are properly referenced and labeled in accordance with this plan.

1. GENERAL MODULE INFORMATION

Instructions: Fill out the fields below with accurate and concise information for each module.

Field	Instruction
Module Number	M4
Module Title	Planning Phase I: Project Start, Tailoring, and Management Plans
Course Title	Sustainable Project Management with PM ² (SPM ²)

2. MODULE OVERVIEW

Instructions: Write 3–5 sentences that summarize the core idea, scope, and role of this module in the course.

This module marks the start of the Planning Phase and lays the groundwork for all structured project management activities. It opens with the preparation and facilitation of the Kick-off Meeting and introduces the concept of tailoring the PM² methodology—adjusting its processes, artefacts, and governance elements to fit the specific type, size, complexity, and sustainability ambition of the project. A central component of this tailoring is the development of the Project Handbook, which consolidates all Project Management Plans (PMPs) and serves as a reference for how the project will be managed across key domains such as risk, communication, sustainability, quality, etc. Following the tailoring logic, students are introduced to the systematic development of Project Management Plans (PMPs). These plans may exist as standalone documents or be structured as annexes or subplans within broader planning artefacts, depending on the project's scope and governance needs. Rather than prescribing a fixed format, the module emphasizes the need to apply critical judgment in determining which plans are needed, how they interrelate, and where sustainability considerations should be explicitly integrated—either as dedicated sections or embedded criteria. Through this, learners will acquire the capacity to create a tailored, realistic, and sustainability-aware planning framework that aligns with the PM² principles and prepares the project for effective execution and monitoring in later phases.



3. LEARNING OBJECTIVES

Instructions: List 2–4 general learning objectives using action verbs from Bloom's Taxonomy (aligned with Course Syllabus Template (CST)) . Focus on what students will understand or be able to do after completing the module.

Note: The learning objectives here should be derived from and aligned with the overarching course-level learning objectives defined in the Course Syllabus Template (CST). You are encouraged to further specify or tailor the objectives to the unique focus of this module, while maintaining full coherence with the overall course direction.

Upon successful completion of this module, students will be able to:

- **LO-1:** Explain the role and structure of the Planning Phase in PM² and its expansion in SPM².
- **LO-2:** Interpret the concept of project tailoring and apply tailoring criteria to adjust governance, artefacts, and processes.
- **LO-3:** Describe the structure and interdependencies of core and optional Project Management Plans.
- **LO-4:** Evaluate how sustainability considerations influence planning artefacts and the structure of the Project Handbook.

4. LEARNING OUTCOMES

Instructions: Define 1–3 specific and measurable learning outcomes for this module (aligned with Course Syllabus Template (CST)).

Note: Module-level outcomes should be directly linked to the learning objectives stated above and traceable to the course-level learning outcomes listed in the CST. Here you have the opportunity to disaggregate or operationalize broader course outcomes into concrete, assessable outputs for this module.

Upon successful completion of this course, students will be able to:

- **Outcome 1:** Apply tailoring logic to define a planning structure suited to a specific project context, including sustainability needs.
- **Outcome 2:** Identify and describe the function of key Project Management Plans (e.g., Communication Plan, Risk Management Plan, Quality Plan).
- **Outcome 3:** Draft a basic outline of a Project Handbook, including sustainability-integrated planning components.
- **Outcome 4:** Justify planning artefact choices based on project complexity, institutional requirements, and sustainability ambition.
- **Outcome-5:** Demonstrate understanding of key planning concepts, artefacts, and sustainability integration principles through a short *Knowledge Check* quiz in the LMS.



5. MODULE LEARNING CONTENT (TOPICS & SUBTOPICS)

Instructions: Outline the instructional content that will be covered in this module. Structure the topics and subtopics logically to guide lecture flow and student learning.



Main Topic	Subtopics / Key Concepts
Project Planning: Purpose and process flow	<ul style="list-style-type: none"> - Transition from Initiation to Planning in PM² - Role of the Kick-off Meeting - Foundation of the Planning Phase and link to PM² lifecycle
PM² tailoring logic	<ul style="list-style-type: none"> - What is tailoring in PM²? - Tailoring governance, artefacts, and processes - Criteria for tailoring: size, complexity, risk, sustainability relevance - Role of the Project Handbook as a tailored management baseline
Core project management plans (PMPs)	<ul style="list-style-type: none"> - Overview of key PMPs: Communication Plan, Risk Management Plan, Quality Plan, Requirements Management Plan, and Sustainability Plan - Functions, structure, and sustainability integration of each PMP - Interdependencies and sequencing among plans
Optional and context-specific plans	<ul style="list-style-type: none"> - Overview of additional plans: Business Implementation Plan, Issue Management Plan, Transition Plan, Deliverable Acceptance Plan, Outsourcing Plan - When and why to include them - Embedding ESG/sustainability in non-core plans
From tailoring to documentation	<ul style="list-style-type: none"> - Constructing a coherent and realistic planning framework - Format variations: standalone plans, annexes, integrated Project Handbook - Aligning plans with sustainability strategy and project type
From theory to application	<ul style="list-style-type: none"> - Group simulation: Planning artefact analysis and design - Linking tailored PMPs to future phases (Execution, Monitoring) - Preparing for planning continuation in Module 5



6. MODULE LEARNING ACTIVITIES AND DELIVERY STRUCTURE

Instructions: Fill in the table to describe teaching content and activities, reflecting a blend of pre-class, in-class, and post-class elements. Ensure alignment with digital and active learning principles.



Segment	Activity Type	Description	Duration	Delivery Format
Pre-class	Intro Video + Guided Reading + Artefact/Template Review	Learners complete three preparatory tasks: <ul style="list-style-type: none"> - Watch a video explaining Planning Phase I in SPM², module learning objectives, outcomes, and structure. - Read selected sections from the SPM² Guide covering tailoring and Project Management Plans (PMPs). - Review relevant templates and artefacts for this phase. 	~2 h	LMS / SPM ² Guide (asynchronous)
In-class	Interactive Lecture + Discussion Group	Instructor leads a walkthrough of the tailoring logic in PM ² , showing how tailoring decisions influence artefacts, governance, and sustainability alignment. Group discussion focuses on analysing real or fictional tailoring cases.	~3 h	F2F or Hybrid (lecture + facilitated discussion)
In-class	Applied Workshop / Simulation	Students co-design the structure of a Project Handbook for a fictional project, selecting required PMPs and identifying how sustainability is embedded. Teams present their structures, highlighting optional vs. core plans, and receive peer feedback.	~3 h	F2F / Workshop Format
Post-class	Knowledge Check Quiz	Learners complete: <ul style="list-style-type: none"> - Knowledge Check (10 questions) testing understanding of tailoring logic, Project Management Plans structure, and the role of the Project Handbook in SPM². 	~30 minutes	LMS Submission (asynchronous)
Post-class	Individual Written Reflection Task	Students reflect on a fictional planning scenario and justify their selected PMPs and tailoring logic,	~2 h	LMS Submission (asynchronous)



		considering sustainability requirements and project complexity.		
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7. PRACTICAL TASK(S) / ASSESSMENT SUMMARY

Instructions:

List each practical assignment in this module in a separate row. For each task, complete the table and provide a clear reference to the Practical Task Description Template (PTDT) document, where full task instructions and grading criteria are given.

The typologies below are **examples only** and intended to guide consistency across modules.

Suggested Task Typologies (for reference only):

- **Case-Based Task** – Analyze real-world or simulated scenarios.
- **Scenario or Game-Based Simulation** – Participate in role-plays or simulations.
- **Design and Planning Task** – Develop strategies, plans, models, or tools.
- **Analytical Task** – Work with data, conduct evaluations, generate insights.
- **Reflection or Personal Development Task** – Engage in self-assessment, journaling, or mindset analysis.
- **Evaluation or Critical Assessment Task** – Critique existing practices using structured criteria.

If your task does not fall neatly into any of the predefined typologies, you may add your own under “Task Typology.”



Task Title	Task Type	Task Typology	Description	PTDT Reference
Designing the Project Handbook Structure	Group Assignment	Design and Planning Task	Based on a fictional project, students co-design the structure of a Project Handbook, selecting relevant PMPs and determining how sustainability considerations are embedded.	PTDT_M4_HandbookDesign.docx
Justifying PMP Selection: Reflection Journal	Individual Assignment	Reflection or Personal Development Task	Students reflect on a fictional planning scenario and justify their selection of Project Management Plans in light of tailoring logic, sustainability relevance, and project complexity.	PTDT_M4_PMPReflection.docx
Knowledge Check Quiz: Tailoring & Planning	Individual Assessment	Analytical Task	Learners complete a 10-question quiz to reinforce their understanding of tailoring logic, core vs. optional PMPs, and the structure of the Project Handbook.	PTDT_M4_KnowledgeCheckQuiz.docx



8. DIGITAL LEARNING RESOURCES AND MULTIMEDIA SUPPORT

Instructions:

List all digital, multimedia, and interactive resources used to support the delivery of this module and learner engagement. Include links to videos, downloadable templates, interactive tools, and LMS-integrated components (e.g., quizzes, polls, checklists). Microlearning materials should also be listed here



Type	Description	Format	Developer
Reading Material	Extract from the SPM ² Guide – Section on Planning Phase I: Covers tailoring principles, Project Handbook, and structure and purpose of core Project Management Plans (PMPs).	PDF	SPM ² Editorial Team
AI Video Intro	Planning Phase in SPM ² : Animated explainer introducing the logic of tailoring, the function of the Project Handbook, and sustainability-aware PMP design.	MP4	SPM ² Authoring Team
Microlearning Unit 1	Planning Artefacts Overview (part I): Project Handbook, PMPs - Downloadable templates	DOCX	Instructional Designer
Downloadable Template	<ul style="list-style-type: none"> • Case scenario (PDF) • Project Handbook Template (DOCX) • PMP templates (DOCX) • Reflection Template (DOCX) 	PDF/DOCX	Authoring Team
LMS Activity	Knowledge Check Quiz – Module 4: 10-question quiz on tailoring decisions, PMP selection, and Project Handbook structure.	SCORM Package	eLearning Team
LMS Activity	Individual Reflection Task: Learners justify selected Project Management Plans for a fictional project and reflect on tailoring decisions in relation to sustainability and complexity.	LMS Form Submission	Course Instructor
Optional Discussion	<ul style="list-style-type: none"> • Optional Pre-class Prompt: “Which tailoring criteria should take priority for complex sustainability-driven projects, and why?” • Optional Post-class Prompt: “Real-world tailoring examples from your own projects.” 	LMS Forum Entry	Course Instructor



9. REQUIRED READINGS AND RESOURCES

Instructions: Divide the required learning materials into *Mandatory* and *Optional* sections.

Mandatory Readings and Tools

- SPM² Guide – Chapter on the *Planning Phase I* (sections on Kick-off Meeting, PM² Tailoring, and Project Management Plans)
- Planning Phase Artefacts:
 - *Project Handbook Template* (SPM² version)
 - *Tailoring Guidelines Checklist* (SPM² version)
 - *Core Project Management Plan Templates* (e.g. Risk, Quality, Communication, Sustainability)

Optional Readings and Resources

- (To be tailored by instructor based on learners' background and course context)

10. FINAL QUALITY CHECK (SELF-REVIEW)

Instructions: Use this checklist before submitting your module. Confirm alignment with the pedagogical flow, and digital readiness. Mark only what is **completed**.

- Each practical task has a PTDT reference
- Readings are categorized (Mandatory/Optional)
- Teaching activities cover pre/in/post-class formats
- Multimedia and microlearning materials are specified
- Linkages to other modules are clearly defined
- All digital learning resources and multimedia components are noted and delivery-ready or marked "pending"