

Name of the project

Hypothesis:

Project Sponsor:

Project Coordinator:

Project Status:

Legal & Tax Matters:

All project participants that are not OIX members, must sign the Open Identity Exchange IPR agreement (Participant Agreement) in order to participate from Stage Gate 3 onwards. Suppliers to this project will need to sign an IDAP Services Agreement.

TABLE OF CONTENTS & CHECKLIST

<u>STAGE GATE 1 - PROJECT OUTLINE</u>	
<ul style="list-style-type: none"> ● Project Sponsor identified? 	
<ul style="list-style-type: none"> ● Project context & hypothesis described? 	
<u>STAGE GATE 2 - PROJECT SCOPE</u>	
<ul style="list-style-type: none"> ● Project listed on OIX UK? 	
<ul style="list-style-type: none"> ● Project coordinator identified? 	
<ul style="list-style-type: none"> ● Project risks identified and mitigated? 	
<ul style="list-style-type: none"> ● Project scope & participants defined? 	
<ul style="list-style-type: none"> ● Privacy Impact Assessment? 	
<u>STAGE GATE 3 - INVESTMENT PROPOSAL</u>	
<ul style="list-style-type: none"> ● Project costs & fees paid to OIX UK? 	

STAGE GATE 1 - PROJECT OUTLINE

In this section the project is defined. A consensus with all parties is achieved on what the project is and what it hopes to achieve.

Project Context

What is the context around the project?

Project Hypothesis

What is the hypothesis to be tested by the project? (Repeat on front page)

Project Objectives

STAGE GATE 2 - PROJECT SCOPE

This section defines exactly how the project will run. It includes what is and isn't included in the project, the user journey and the individual responsibilities of the project team.

Description of scope

What is included in the project?

E.g. user understanding, technical scoping, commercial business case

Project Out-of-Scope Description

The project will not include:

Use Case 1	HIGH LEVEL DESCRIPTION
Possible Actors: Beneficiaries	
Summary: Step by step user journey	

Use Case 2	HIGH LEVEL DESCRIPTION
Possible Actors: Beneficiaries	
Summary: Step by step user journey	

Project People Resource	<u>Individual</u>	Role / Deliverables	Time (Days)
Project Coordinator			
Project report Author			
User Research			
Wireframes Developer			
Comms representatives / planning			
Potential Relying Parties			
Other Potential Participants			
Other Stakeholders <i>in addition to Key Stakeholders above i.e. parties who will be interested in the outcomes of the project but do not need to be actively involved</i>			

Below indicate the project timelines in the table below.

Date	Milestone	Other details
	<i>The following are just example milestones</i>	
	Kick-off workshop	
	User research plan	
	User testing	
	White Paper	
	Project report published	

Non 'Open' Project Deliverables

The Project Report and OIX website will publish details about the project and its open source deliverables. It is assumed that all items discussed during the project will be open source. Organisations will have products and services that they have developed outside the project for which they own the Intellectual Property. These products and services should be defined in this section.

For this project the following products and services will not be considered open source:

Organisation	Product/tool	Agreement

Risks	
Is an pre-existing IPR within scope?	
Does this project impact other OIX projects?	
What other considerations?	

Discovery / Alpha: Is real data being used? If yes, what privacy and security safeguards are in place?	
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Privacy Impact Assessment

Privacy Considerations	Have these been considered
The following questions are about the planned concept and should be addressed during the project.	
Describe data flows. Describe what data is used, for what purposes, by whom. Describe the parties and their roles (e.g. utilising and making decisions about user data versus processing data on behalf of another party).	
Is there an interface where user can be informed, in advance, about data utilisation? Where/when/how? If user consent is needed for processing data, how can that be asked?	
Is your planned data utilisation in line with users' reasonable expectations? Do you expect challenges in explaining or justifying to users why/how their data would be used? Why?	
What measures are taken to ensure that the Identity Assurance Principles are followed (e.g. transparency, user control, data minimisation)?	

STAGE GATE 3 - INVESTMENT PROPOSAL

This section details the agreed funding structure of the project.

High Level Funding	
Investors	
Estimated overall project cost	(project days @ £500 a day)
Total Contribution Requested (inc VAT)	
Project Funders and Amounts	

Project Costs	Resource (Organisation and Name)	Funding source & Cost (inc VAT)
Project Coordination		
User Research		
User research lab		
User recruitment + incentives		
Wireframe / User Journey Development		
Project Report		
Comms/Marketing		
Video Production		
TOTAL		

PROJECT PROPOSAL NEEDS TO BE REVIEW BY OIX PRIOR TO PROJECT COMMENCEMENT. ALL NON-OIX MEMBERS MUST HAVE SIGNED AND RETURNED

THE PARTICIPANT AGREEMENT IN ORDER TO PARTICIPATE FURTHER IN A PROJECT. ALL FINANCIAL CONTRIBUTORS ADVISED OF DIRECTED FUNDING POLICY.

STAGE GATE 4 - STATEMENTS OF REQUIREMENTS & WORK

STATEMENT OF REQUIREMENTS

Requirements	Description	Required Date
Requirement 1		
Requirement 2		

Requirement 3		
Requirement 4		

Timetable

Please provide further detail on the outline plan in Stage Gate 2.

Date	Milestone	Other details
	<i>The following are just example milestones</i>	
	Kick-off workshop	
	User Research plan	
	User testing	
	User Research	
	Project report published	

Project Management & Governance:

This Statement of Requirements is provided in order for the participants to create a Statement of Work. The Statement of Work deliverables form part of the contractual agreement with OIX (IDAP Services Agreement)