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Name of Project:	
Type of Project:	**(Discovery/Alpha/Beta/Other)**

Hypothesis:

Project Sponsor:	
Project Coordinator:	
Project Status:	

TABLE OF CONTENTS & CHECKLIST

PROJECT OUTLINE	
● Project Sponsor identified?	
● Project context & hypothesis described?	
PROJECT SCOPE	
● Project coordinator identified?	
● Project risks identified and mitigated?	
● Project scope & participants defined?	
● Project proposal approved by OIX UK Board?	
● Project listed on OIX UK Website Prospective Projects?	
INVESTMENT PROPOSAL	
● Project costs & fees paid to OIX UK?	
● Participant Agreements signed for non members?	
STATEMENTS OF REQUIREMENTS & WORK	
● Statement of Requirements & Statements of Works agreed?	
● Project page at OIX UK created?	

Legal Matters:
All participating non-OIX members, must sign the Open Identity Exchange Participant Agreement (IPR) and pay the project participation fee prior to a project proceeding.

Key Contacts

Name	Organisation	Contact details

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

How do the project objectives align with OIX vision and mission?

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:

Project People Resource	Individual	Role / Deliverables	Time (Days)
Project Coordinator			
White Paper Author			
Customer Insight Research			
Wireframes Developer			
Comms representatives / planning			
Potential Relying Parties			
Add Other			

Potential Participants			
Add Other Stakeholders *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*			

Outline Project Schedule		
Date	**Milestone**	**Other details**
	The following are just example milestones	
	Kick-off workshop	
	Customer insight plan	
	User testing	
	White Paper	
	Project report published	

Non 'Open' Project Deliverables
The White Paper 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 any 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? Name the person responsible for the real data for this project	

This section details the agreed funding structure of the project.

Investment Summary	
Project Funders	
Estimated overall project cost	
Project cash contributions through OIX UK for project costs detailed below	

Project Cash Costs	Organisation Incurring Cost	Resource Number of Days Provided	Required cash cost (inc VAT)
Project Coordination	Name of organisation incurring cost / providing resource	N/A If cost is not for resources.	N.B. £0 means resource supplied to project free of charge
Customer Insight Research			N.A. (where not required)
User research lab			Eg £X where mutual funding required
User recruitment + incentives			
Wireframe / User Journey Development			
White Paper			
Comms/Marketing			
Video Production			
Non OIX members Participation Fee (*see table)			

OIX Facilitation Fee (£2,500 + VAT). For projects over £25K please refer to OIX for facilitation fee			£3,000
TOTAL			

Source of funding to cover required Cash Cost must be completed below:

Funding Organisation(s)	Cash Funding Provided (inc VAT)
E.g Open Identity Exchange	£0,000
TOTAL (must match total listed in Project Cash Costs table above)	

*Participation Fee Payable to OIX	UK £ + VAT
Commercial less than 10 employees	400
Commercial 10-50 employees	875
Commercial 50-100 employees	2000
Commercial 100-250 employees	4000
Commercial 250-500 employees	6000
Commercial + 500 employees	8000
Academic/non-profit	900
Government	2000
*Waived for members in good standing	

PROJECT PROPOSAL NEEDS TO BE REVIEWED BY OIX UK BOARD PRIOR TO PROJECT COMMENCEMENT. ALL NON-OIX MEMBERS MUST HAVE SIGNED AND RETURNED THE PARTICIPANT AGREEMENT AND PAID THE PARTICIPATION FEE IN ORDER TO PARTICIPATE IN A PROJECT.

All participants are required to complete a Statement of Work that reflects their contribution to the project requirements, set out in the Statement of Requirements

that is completed by the project co-ordinator.

STATEMENTS OF REQUIREMENTS & WORK

STATEMENT OF REQUIREMENTS

Requirements	Description	Required Date
Requirement 1		
Requirement 2		
Requirement 3		
Requirement 4		

Privacy Considerations	Description	Mitigation
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)?		

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.

STATEMENT OF WORK

This Statement of Work should reflect back the requirements, together with estimate of effort and confirmed delivery/completion dates that reflects the SoR plus any subsequent discussion and agreement amongst the project team.

Below please detail each deliverable and task/s which supports the deliverable

High Level Project Timelines & Milestones	Deliverable	Man Days	Task/s to Support Deliverables
Date	Deliverable	Days	
Date	Deliverable	Days	
Date	Deliverable	Days	
Date	Deliverable	Days	
Date	Deliverable	Days	
Date	Deliverable	Days	
Date	Deliverable	Days	
Date	Deliverable	Days	
Date	Deliverable	Days	
DELIVERABLE DATE	Deliverable	Days	Report, Presentation, White Paper

Resources:
<mark>Please detail what resources are required / what facilities will be used / whose equipment will be required</mark>

OIX Funding:
<mark>Please include the OIX Funding to be paid to the Principal Organisation relating to this Statement of Work. Include VAT in the figure.</mark>

Other Details:
<mark>Please feel free to add any other relevant details</mark>

Other Details:
This Statement of Work forms part of the project agreement with the Open Identity Exchange. The project will contain a date defined as the Deliverable Date, all deliverables must be submitted by this date. This date may change only with the approval of both the Project Coordinator and Project Sponsor. The Deliverable Date is contained within this Statement of Work.