



Get Started with Project Management: “Starter Kit Session”

CITE 2022 | SAN DIEGO COUNTY OFFICE OF EDUCATION

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Enterprise Project Management Office (EPMO) | Nov. 30, 2022

MEET OUR TEAM



“
*Say “hello”
to my little
project charter!*

-Tony Montana
Scarface

Peyri Herrera
Senior Director
Integrated Technology Services



“
*I find your lack
of project plan
disturbing.*

-Darth Vader
Star Wars

Reesa Fickett, PMP
Senior Project Manager
Integrated Technology Services



“
*I love the smell of
standup meetings
in the morning.*

-Lt. Colonel Kilgore
Apocalypse Now

Andrew Baldwin, PMP
Project Manager
Integrated Technology Services



“
*Live long,
and provide
status reports.*

-Spock
Star Trek

Candace Wong
Project Management Assistant
Integrated Technology Services



san diego county office of
EDUCATION
FUTURE WITHOUT BOUNDARIES™

**Enterprise
Project
Management
Office**



epmo.sdcoe.net



**Share the name
of a project
you're currently
working on
(or have coming up)**

What's going
on in your
IT shop?

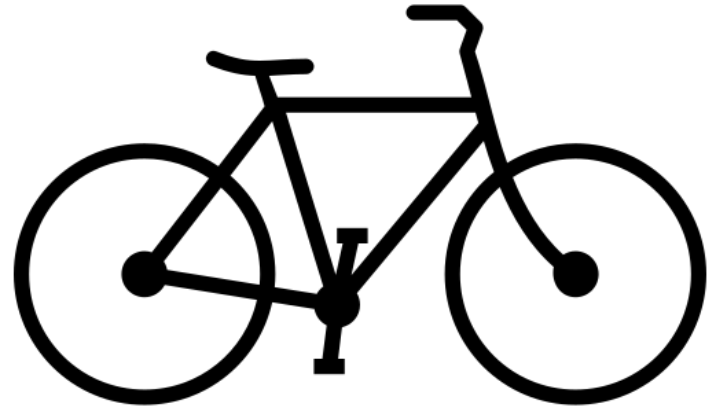


**For your past projects,
at which phase or phases
do you wish things went
a little better?**

PLANNING PHASE
EXECUTION PHASE
CLOSURE PHASE

MANAGING A PROJECT IS EASY.

It's like riding a bike.
Except the bike is on fire.
You're on fire.
Everything is on fire.



Session Goals

01

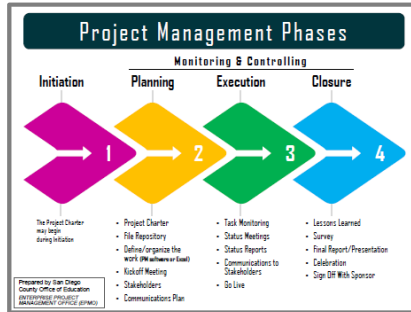
"I know the major **phases of project management**."

02

"I can use the SDCOE project charter template to **plan** my next project."

03

"I can refer to 3 checklists to help me **execute** and **close** my next project."



Start here

PLANNING

EXECUTION

CLOSURE

Project Charter **DRAFT**

Project authorized by _____ on _____

I. Project Name
Project Name: X Start Date: XXXXXXXX End Date: XXXXXXXX

II. Project Organization
Indicate all project team members and how frequently you will communicate with them.

Project Manager
Conducts all project team activities, reports on project status, project team tasks, resources, and manages the project resources.

Sponsor
The sponsor is the person authorized to engage the project and provide the project with authority and resources for the project.

Stakeholders
The stakeholder is any individual, group, or organization that may have an interest in or be affected by the project.

Others Involved
Other individuals who may be involved and have an interest in the project.

III. Project Details
Write a brief description of this project in simple, easy-to-understand terms. What are you trying to accomplish? Why?

Scope
What is the project's purpose? What is included (or not included) that can help manage the expectations?

Deliverables
What products or results do you expect upon completion of the project?

SCODE Integrated Technology Services (ITS)

PROJECT MANAGEMENT TOOLKIT

Key Activities of the Execution Phase

Key Project Management Activities During Execution	
Monitor progress, keep track of the calendar	
1	Monitor the project plan frequently. Team members should update their status.
2	Check in with team members as needed. Establish rapport with the team; make sure they are on track.
Plan and conduct meetings, determine action items	
3	Lead status meetings. Meeting duration and frequency will vary.
4	Lead standup meetings as needed. These are typically short daily meetings.
Manage the project	
5	Identify new activities or add tasks. Watch out for scope creep (new tasks).
6	Monitor risks. Quickly address any risks.
7	Monitor budget, if required. Track project costs.
Communicate the project	
8	Prepare and send status reports. Capture accomplishments.
9	Communicate up and out when needed. Stay in touch with your steering committee and sponsor.
Go Live (Become operational)	
10	Prepare for Go Live. Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.

SCODE Integrated Technology Services (ITS)

Go Live Checklist (Starting Point)

Testing and Sign Off

Support Team

Training & Communication

Go / No Go Meeting

Are we ready? Is it a go?

PROJECT MANAGEMENT TOOLKIT

Project Closeout Checklist

Use this checklist to help you close out your project.

1. Lessons Learned <ul style="list-style-type: none"> Identify and document lessons learned. Conduct a thorough post-mortem process. Gather feedback from all stakeholders. Highlight important issues that will help improve the efficiency, value, workflow, speed of completion, cost-effectiveness, and team synergy of the next project. Use this information in your Final Presentation. 	2. Survey <ul style="list-style-type: none"> Assist the team with conducting a survey. Determine if the project objectives were met. Measure satisfaction. Use the results in your Final Presentation.
3. Final Presentation <ul style="list-style-type: none"> Create a final report or presentation and use it to conduct a project closeout meeting. Create a final report/presentation that you can present to your project sponsor and steering committee. Generally you will include a Project Overview, Survey Results, Lessons Learned, and What's Next. Present the final report prior to conducting your celebration. 	4. Celebration <ul style="list-style-type: none"> A celebration and camaraderie can help energize everyone for the next project. Make it fun. Leverage prizes from your final report/presentation - not everyone remembers (or knew) all the details of the project, so don't forget to include the project recap. Ask your project sponsor to share a few words.
5. Archive <ul style="list-style-type: none"> Archive project documentation. Your project manager should lead in the project from start to finish. This includes project files, meeting minutes, and when you sign off with your Project Sponsor, explain what was achieved. 	6. Other Closeout Items <ul style="list-style-type: none"> Hand over project ownership, if necessary. Transfer management of the completed project to the new owner. Settle payments, if necessary. Process outstanding financial information that will help you optimize the budget for the next project.
7. Sign Off with Project Sponsor <ul style="list-style-type: none"> Review the project scope, the deliverables, and all of the completed closeout items. Ensure 100% satisfaction. 	<p>Hooray, you did it!</p>

SCODE Integrated Technology Services (ITS)

01

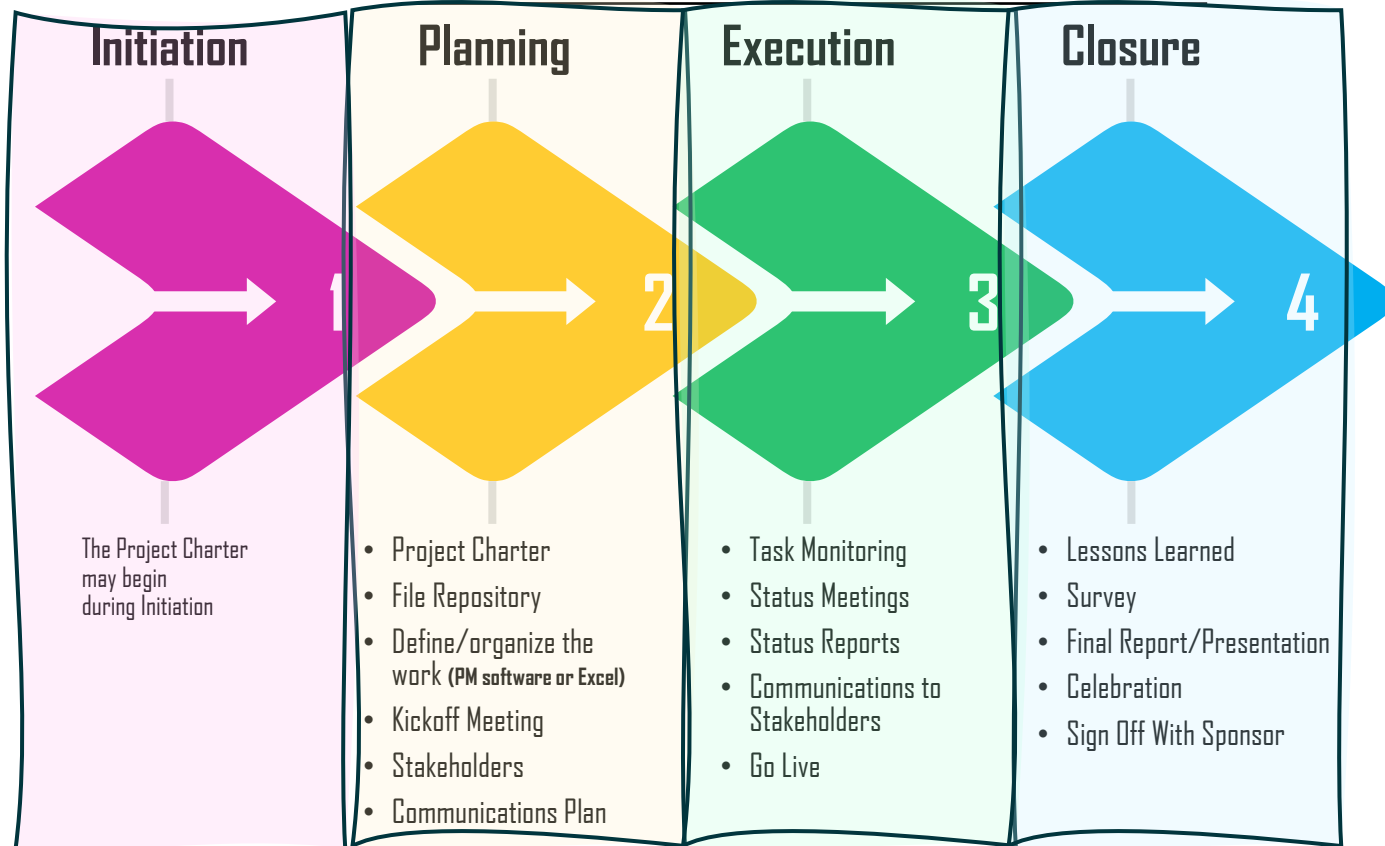
PROJECT MANAGEMENT PHASES

Planning, Execution, and Closure



Project Management Phases

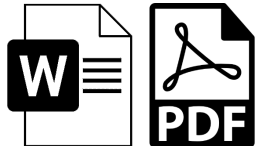
Monitoring & Controlling



02

THE PROJECT CHARTER

What type of information goes in a project charter? Why do we write one?



Project Charter **DRAFT**



Project authorized by _____ on _____

I. Project Name

Project Name X	Start Date XX/XX/XX	End Date XX/XX/XX
----------------	---------------------	-------------------

II. Project Organization

Indicate all project team members and how frequently you will communicate with them.

Project Manager Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives • X	Sponsor The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project • X
Steering Committee Key people that assist the project manager in making decisions and moving the project forward • X <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed	Stakeholders An individual, group, or organization that may affect or be affected by outcome of the project • X <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed
Project Team Supports the project manager in performing work of the project to achieve its objectives • X <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed	Others Involved List anyone else who will be involved and state their roles • X <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed

III. Project Details

Project Description Write a brief description of this project in simple, easy-to-understand terms. What are you trying to accomplish? Why? X
Scope Who/how many this will impact? What is included (or not included) that can help manage the expectations? In scope: • X Out of scope: • X
Deliverables Which products or results do you expect upon completion of the project? • X

Goals Alignment

With which Board Goals and ITS Goals does this project align?

- | | |
|---|--|
| <input type="checkbox"/> #B1 Connect the educational experience to the world of work | <input type="checkbox"/> #ITS1 Maximize Customer Success |
| <input type="checkbox"/> #B2 Provide educational opportunities and supports to SDCOE schools and school districts | <input type="checkbox"/> #ITS2 Create Value |
| <input type="checkbox"/> #B3 Become the leader and model for innovation | <input type="checkbox"/> #ITS3 Improve Division Efficiencies |
| <input type="checkbox"/> #B4 Maximize human and operational resources to strengthen the organizational culture of SDCOE | <input type="checkbox"/> #ITS4 Protect-Detect-Respond |

Objectives/Success Criteria

How will you know if the project was a success? List what you are trying to accomplish and the success criteria.

- X

Risks

List the things that you think could be risks to the success of the project. If possible, list the mitigation strategy for each risk.

- X

IV. Project Schedule & Milestones

Based on your needs, list either the phases and/or major milestones of the projects. Include start and end dates.

Phase/Major Milestone	Responsible (Lead)	Start Date or Month Begin	End Date or Month End
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

V. Tools

<input type="checkbox"/> Monday.com	If Yes, which board? _____ Do any new members need to be added? _____
<input type="checkbox"/> Microsoft Teams	If Yes, which team/channel will you use? _____
<input type="checkbox"/> OneDrive	If Yes, whose OneDrive, and what is the folder named? _____
<input type="checkbox"/> SharePoint Site	If Yes, which site, and what is the folder named? _____
<input type="checkbox"/> Other	

VI. Other Items to Consider

- **Project Budget:** Estimate the cost of the project.
- **Communication Plan:** Identify all critical communication channels for project stakeholders, frequency of communication, types of information to be communicated, and method of regular communication.
- **Tracking and Status Updates:** Identify the methods the project team will use to regularly update the project status including methods of tracking project progress and which organizational stakeholders receive notification of project status.
- **Training Plan/Documentation Plan:** Identify any necessary training and documentation for project stakeholders, including content, delivery method, etc.
- **Project Close Out:** Determine the final actions/steps to close out the project. Examples include sign off documentation, lessons learned meetings and documentation, surveys/evaluations, and a celebration and/or acknowledgement.

Your well-written, detailed Project Charter will address a variety of questions.

WHO

- Who's involved, who's doing the work? Who is this for? Who's impacted?

WHAT

- What is the scope? What are we delivering? What are the risks?
What is the cost?

(WHERE)

- Which database, environment, etc.? Which physical location, room, building, etc.?

WHEN

- What is the project schedule? What are the milestones?

WHY

- Why are we doing this project?

HOW

- How does this align with our mission and goals? How will we know we are successful? How will we communicate (project team, stakeholders, etc.)?

View our Project Charter tutorial (6 min)

epmo.sdcoe.net



03

EXECUTION PHASE CHECKLIST

All that project planning pays off
when you are in Execution!



PROJECT MANAGEMENT TOOLKIT

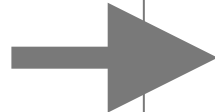
What are the key activities of the Execution Phase?











Directions: Use the word bank to fill in the key activities that occur during the Execution Phase.

WORD BANK

- budget
- Go Live
- new
- project plan
- risks
- standup
- status
- status reports
- team members
- up / out

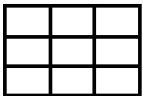
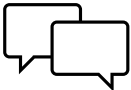
Please
find
this page!





Key Project Management Activities During Execution		
Monitor progress, keep track of the calendar and milestones		
1		Monitor the _____ frequently. <i>Team members should update their status and add new tasks.</i>
2		Check in with _____ as needed. <i>Establish rapport with the team; make sure there are no roadblocks.</i>
Plan and conduct meetings, determine action items and assign next steps		
3		Lead _____ meetings. <i>Meeting duration and frequency will vary by project.</i>
4		Lead _____ meetings as needed. <i>These are typically short daily meetings (15 min).</i>
Manage the project		
5		Identify _____ activities or adjustments to the plan. <i>Watch out for scope creep (new scope added after the project starts).</i>
6		Monitor _____. <i>Quickly address any risks.</i>
7		Monitor _____, if required. <i>Track project costs.</i>
Communicate the status of your project		
8		Prepare and send _____. <i>Capture accomplishments, in progress, what's next, and risks.</i>
9		Communicate _____ and _____ when needed. <i>Stay in touch with your sponsor, steering committee, and stakeholders.</i>
Go Live (become operational)		
10		Prepare for _____. <i>Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.</i>

Can you identify
the 10 key activities
of the
Execution Phase?


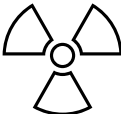

Key Activities of the Execution Phase

Monitor progress, keep track of the calendar and milestones		
1		Monitor the <u>project plan</u> frequently. <i>Team members should update their status and add new tasks.</i>
2		Check in with <u>team members</u> as needed. <i>Establish rapport with the team; make sure there are no roadblocks.</i>



Key Activities of the Execution Phase

Plan and conduct meetings, determine action items and assign next steps		
3		Lead status meetings. <i>Meeting duration and frequency will vary by project.</i>
4		Lead standup meetings as needed. <i>These are typically short daily meetings (15 min).</i>


Key Activities of the Execution Phase

Manage the project		
5		Identify new activities or adjustments to the plan. <i>Watch out for scope creep (new scope added after the project starts).</i>
6		Monitor risks . <i>Quickly address any risks.</i>
7		Monitor budget , if required. <i>Track project costs.</i>

Key Activities of the Execution Phase



Communicate the status of your project		
8		Prepare and send <u>status reports</u> . <i>Capture accomplishments, in progress, what's next, and risks.</i>
9		Communicate <u>up</u> and <u>out</u> when needed. <i>Stay in touch with your sponsor, steering committee, and stakeholders.</i>

Key Activities of the Execution Phase



Go Live (Become operational)		
10		<p>Prepare for Go Live.</p> <p><i>Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.</i></p>

Key Project Management Activities During Execution


Monitor progress, keep track of the calendar and milestones


- 1  **Monitor the project plan frequently.**
Team members should update their status and add new tasks.
- 2  **Check in with team members as needed.**
Establish rapport with the team; make sure there are no roadblocks.


Plan and conduct meetings, determine action items and assign next steps

- 3  **Lead status meetings.**
Meeting duration and frequency will vary by project.
- 4  **Lead standup meetings as needed.**
These are typically short daily meetings (15 min).



Manage the project

- 5  **Identify new activities or adjustments to the plan.**
Watch out for scope creep (new scope added after the project starts).


- 6  **Monitor risks.**
Quickly address any risks.

- 7  **Monitor budget, if required.**
Track project costs.

Communicate the status of your project

- 8  **Prepare and send status reports.**
Capture accomplishments, in progress, what's next, and risks.
- 9  **Communicate up and out when needed.**
Stay in touch with your steering committee and stakeholders.

Go Live (Become operational)

- 10  **Prepare for Go Live.**
Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.

Take a look at the list...



Q: Which skills are **essential** to effectively lead/complete these key activities?

04

GO LIVE CHECKLIST

Get **everyone** ready for your launch!



Go Live = To become operational; the time at which something becomes available for use



For the last 7 months, ABC Unified has been working on a project to implement a new SIS.



Next month is Go Live. The team has been working hard, but is the system ready? Are their users ready? Are they?



Q: What is usually your top area of focus before launch of a new technology?

Go Live Checklist (Starting Point)



Testing and Sign Off

☐

- ☐ Has user acceptance testing been completed?
- ☐ Have all issues related to going live been resolved?
- ☐ Has the appropriate party (Project Sponsor or other) given acceptance to proceed with moving the delivered system, service or product into production?
- ☐ If applicable, has your Change Control Board been notified?
- ☐ Do we have a backout plan, if needed?

Support Team

☐

- ☐ Have your support staff been trained and/or provided documentation?
- ☐ Are they prepared to provide ongoing support?
- ☐ If necessary, has the "service" been added to your service catalog?
- ☐ If necessary, has the vendor been notified that their support processes need to be engaged?
- ☐ Do you have a clear plan for "Day 1" support procedures, and has that been communicated to the team?

Training & Communication

☐

- ☐ Has training been provided to employees/users, and job aids/videos made available?
- ☐ Has the go live date and other important information been communicated to all project stakeholders?

Go / No Go Meeting

Are we ready?
Is it a go?

05



PROJECT CLOSEOUT CHECKLIST

Wrap up your project with success
and provide closure for all parties.



Last school year we polled 26 district tech leaders across San Diego County...

For your past projects, at which phase(s) do you wish things went better?	Count	%
Planning Phase	2	8%
Execution Phase	4	15%
Closure Phase	12	46%
Planning Phase; Closure Phase	1	4%
Planning Phase; Execution Phase	1	4%
Planning Phase; Execution Phase; Closure Phase	6	23%
Total	26	100%

Project Closeout Checklist

Use this checklist to help you close out your project.



1. Lessons Learned

☐ Identify and document lessons learned.

- Conduct a thorough postmortem process.
- Gather feedback from all stakeholders.
- Highlight important issues that will help improve the quality, value, workflow, speed of completion, cost-efficiency, and team synergy of the next project.
- Use this information in your Final Presentation.



2. Survey

☐ Assist the team with conducting a survey.

- Determine if the project objectives were met.
- Measure satisfaction.
- Use the results in your Final Presentation.



3. Final Presentation

☐ Create a final report or presentation and use it to conduct a project closeout meeting.

- Create a final report/presentation that you can present to your project sponsor and steering committee.
- Generally you will include a Project Overview, Survey Results, Lessons Learned, and What's Left.
- Present the final report prior to conducting your Celebration.



4. Celebration

☐ A celebration and camaraderie can help energize everyone for the next project.

- Keep it short.
- Make it fun.
- Leverage pieces from your final report/presentation – not everyone remembers (or knew) all the details of the project, so don't forget to include the project recap.
- Ask your project sponsor to share a few words



5. Archive

☐ Archive project documentation.

- Archive relevant docs used in the project from start to finish. This includes project files, recorded meetings, and your Monday.com board.
- When you sign off with your Project Sponsor, explain what was archived.

6. Other Closeout Items

- Hand over project ownership, if necessary. Transfer management of the completed project to the new owner.
- Settle payments, if necessary. Process outstanding invoices. Note down variances, cost efficiencies, and other financial information that will help you optimize the budget for the next project.
- EPMD Only: Send the "How Did We Do?" Customer Satisfaction survey to the Project Sponsor and Project Team.



7. Sign Off with Project Sponsor


- ☐ Review the project scope, the deliverables, and all of the completed closeout items. Ensure 100% satisfaction.

Hooray, you did it!


Lessons Learned


Documents > General > 09. Lessons Learned

 Name ▾

 Phase 1A - ITS Managers

 Phase 1B - ITS Classified Staff

 Phase 2 - SDCOE Managers

 Phase 3 - SDCOE Staff



What worked well?



Where can we improve?



What are you proud of?

Stakeholder Survey

Documents > General > 10. Surveys

📄 Name ▾

📁 Phase 1A ITS Managers

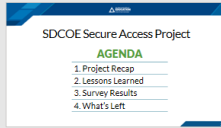
📁 Phase 1B ITS Classified Staff

📁 Phase 2 SDCOE Managers

📁 Phase 3 SDCOE Staff

Comparison Chart		Scores of 3.0 indicate agreement; those that approach 4.0 indicate strong agreement. ⬆️ ⬆️ The arrows denote a difference of 10% or more			
		ITS Managers PHASE 1A	ITS Staff PHASE 1B	SDCOE Managers PHASE 2	SDCOE Staff PHASE 3
Use YubiKey as primary method		75%			
Use Duo Mobile as primary method		31%	73%	54% ⬇️	71% ⬆️
Use their personal mobile phone for MFA		78%	25%	54% ⬆️	32% ⬇️
Agree the methods are simple		OUT OF 4.0: YubiKey = AVG 3.7 Duo Mobile = AVG 3.4 SMS Text = AVG 3.2	OUT OF 4.0: YubiKey = AVG 3.5 Duo Mobile = AVG 3.6 SMS Text = AVG 3.4	OUT OF 4.0: YubiKey = AVG 3.2 Duo Mobile = AVG 3.2 SMS Text = AVG 3.1	OUT OF 4.0: YubiKey = AVG 3.1 Duo Mobile = AVG 3.0 SMS Text = AVG 2.5
Understand the importance of MFA		100% agreement AVG 3.8	100% agreement AVG 3.8	92% agreement AVG 3.5	87% agreement AVG 3.2
Agree the job aids are clear/easy to follow		100% agreement AVG 3.5	97% agreement AVG 3.4	84% agreement AVG 3.1	86% agreement AVG 3.1
Methods of support used ✓ = highest compared to other phases		Printed job aid = 56% Electronic job aid = 41% Asked a colleague = 41% ServiceNow ticket = 28% MFA Helpline = 3%	Printed job aid = 80% ✓ Electronic job aid = 30% Asked a colleague = 36% ServiceNow ticket = 16% MFA Helpline = 3%	Printed job aid = 79% Electronic job aid = 49% ✓ Asked a colleague = 28% ServiceNow ticket = 31% MFA Helpline = 17% ✓	Printed job aid = 68% Electronic job aid = 32% Asked a colleague = 34% ServiceNow ticket = 15% MFA Helpline = 10%
Agree questions and issues were answered in a timely manner		100% agreement - AVG 3.5	100% agreement - AVG 3.6	87% agreement - AVG 3.3	94% agreement - AVG 3.3

Welcome and Topics

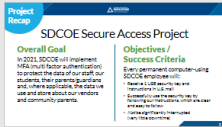


1

2

Project Recap

USE INFO FROM YOUR PROJECT CHARTER...



3

4

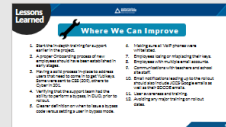
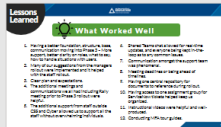
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6

7

Lessons Learned

SUMMARIZE YOUR LESSONS LEARNED...



8

9

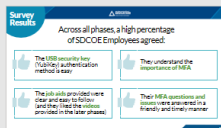
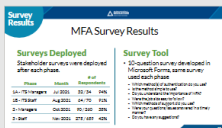
10

11

12

Survey Results

SUMMARIZE YOUR SURVEY FINDINGS...



Survey Item	Phase 1A	Phase 1B	Phase 2	Phase 3
1. I understand the importance of MFA	75%	75%	84%	75%
2. I understand the importance of MFA	75%	75%	84%	75%
3. I understand the importance of MFA	75%	75%	84%	75%
4. I understand the importance of MFA	75%	75%	84%	75%
5. I understand the importance of MFA	75%	75%	84%	75%
6. I understand the importance of MFA	75%	75%	84%	75%
7. I understand the importance of MFA	75%	75%	84%	75%
8. I understand the importance of MFA	75%	75%	84%	75%
9. I understand the importance of MFA	75%	75%	84%	75%
10. I understand the importance of MFA	75%	75%	84%	75%

13

14

15

Wrap Up

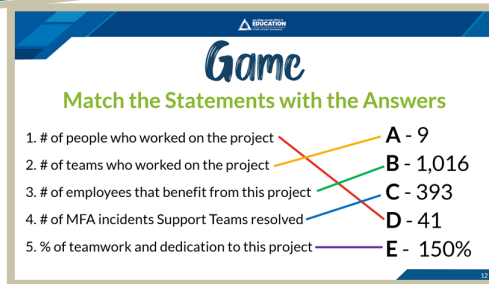
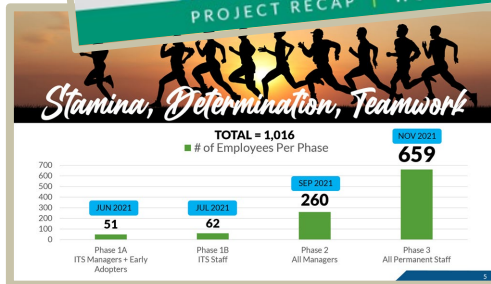
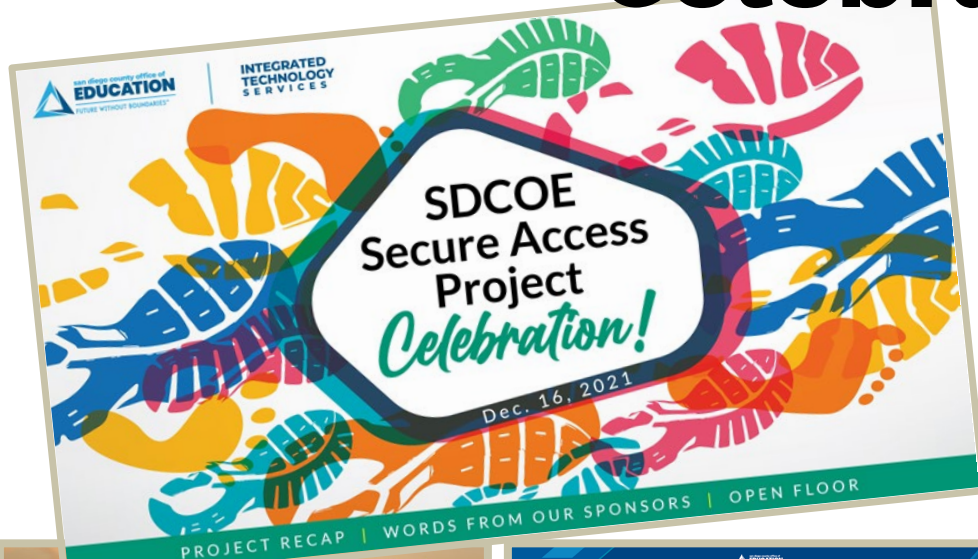
SHARE WHAT'S LEFT



16

Final Report

Celebration



Project Closeout Checklist

Use this checklist to help you close out your project.



1. Lessons Learned

☐ Identify and document lessons learned.

- Conduct a thorough postmortem process.
- Gather feedback from all stakeholders.
- Highlight important issues that will help improve the quality, value, workflow, speed of completion, cost-efficiency, and team synergy of the next project.
- Use this information in your Final Presentation.



2. Survey

☐ Assist the team with conducting a survey.

- Determine if the project objectives were met.
- Measure satisfaction.
- Use the results in your Final Presentation.



3. Final Presentation

☐ Create a final report or presentation and use it to conduct a project closeout meeting.

- Create a final report/presentation that you can present to your project sponsor and steering committee.
- Generally you will include a Project Overview, Survey Results, Lessons Learned, and What's Left.
- Present the final report prior to conducting your Celebration.



4. Celebration

☐ A celebration and camaraderie can help energize everyone for the next project.

- Keep it short.
- Make it fun.
- Leverage pieces from your final report/presentation – not everyone remembers (or knew) all the details of the project, so don't forget to include the project recap.
- Ask your project sponsor to share a few words



5. Archive

☐ Archive project documentation.

- Archive relevant docs used in the project from start to finish. This includes project files, recorded meetings, and your Monday.com board.
- When you sign off with your Project Sponsor, explain what was archived.

6. Other Closeout Items

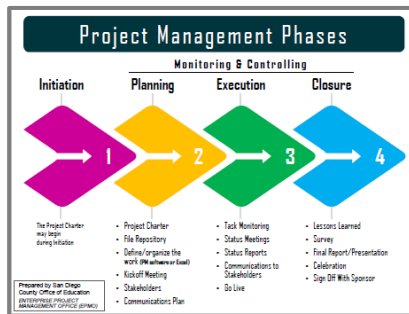
- Hand over project ownership, if necessary. Transfer management of the completed project to the new owner.
- Settle payments, if necessary. Process outstanding invoices. Note down variances, cost efficiencies, and other financial information that will help you optimize the budget for the next project.
- EPMD Only: Send the "How Did We Do?" Customer Satisfaction survey to the Project Sponsor and Project Team.



7. Sign Off with Project Sponsor

- ☐ Review the project scope, the deliverables, and all of the completed closeout items. Ensure 100% satisfaction.

Hooray, you did it!



Q: Which tool are you most excited to try?

PLANNING

Project Charter DRAFT

Project authorized by _____ on _____

I. Project Name
Project Name: X

II. Project Organization
Indicate all project team members and how frequently you will communicate with them.

Project Manager
The project manager is responsible for the project and for the success of the project. The project manager is responsible for the project and for the success of the project.

Sponsor
The sponsor is responsible for the project and for the success of the project. The sponsor is responsible for the project and for the success of the project.

Stakeholders
The stakeholders are responsible for the project and for the success of the project. The stakeholders are responsible for the project and for the success of the project.

Others Involved
The others involved are responsible for the project and for the success of the project. The others involved are responsible for the project and for the success of the project.

III. Project Details
Write a brief description of this project in simple, easy-to-understand terms. What are you trying to accomplish? Why?

Scope
What many this will impact? What is included (or not included) that can help manage the expectations?

Deliverables
What products or results do you expect upon completion of the project?

Project Charter 1

SCOE Integrated Technology Services (ITS)

EXECUTION

PROJECT MANAGEMENT TOOLKIT

Key Activities of the Execution Phase

Key Project Management Activities During Execution
1. Monitor the project plan frequently. Team members should update their status.
2. Check in with team members as needed. Establish rapport with the team; make sure they are on track.
3. Lead status meetings. Meeting duration and frequency will vary. These are typically short daily meetings.
4. Lead standup meetings as needed. These are typically short daily meetings.
5. Identify new activities or changes. Watch out for scope creep (new tasks).
6. Monitor risks. Quickly address any risks.
7. Monitor budget, if required. Track project costs.
8. Prepare and send status reports. Capture accomplishments.
9. Communicate up and out when needed. Stay in touch with your steering committee and sponsor.
10. Prepare for Go Live. Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.

SCOE Integrated Technology Services (ITS)

Key Activities of the Execution Phase

Go Live Checklist (Starting Point)

Testing and Sign Off

Support Team

Training & Communication

Go / No Go Meeting

Are we ready? Is it a go?

CLOSURE

PROJECT MANAGEMENT TOOLKIT

Project Closeout Checklist

Use this checklist to help you close out your project.

<p>1. Lessons Learned</p> <ul style="list-style-type: none"> Identify and document lessons learned. Conduct a thorough post-mortem process. Gather feedback from all stakeholders. Highlight important issues that will help improve the quality, value, workflow, speed of completion, cost-efficiency, and team synergy of the next project. Use this information in your Final Presentation. 	<p>2. Survey</p> <ul style="list-style-type: none"> Assess the team with conducting a survey. Determine if the project objectives were met. Measure satisfaction. Use the results in your Final Presentation.
<p>3. Final Presentation</p> <ul style="list-style-type: none"> Create a final report or presentation and use it to conduct a project closeout meeting. Create a final report/presentation that you can present to your project sponsor and steering committee. Generally you will include a Project Overview, Survey Results, Lessons Learned, and What's Next. Present the final report prior to conducting your celebration. 	<p>4. Celebration</p> <ul style="list-style-type: none"> A celebration and camaraderie can help energize everyone for the next project. Make it fun. Use leverage prizes from your final report/presentation - not everyone (members or know) all the details of the project, so don't forget to include the project recap. Ask your project sponsor to share a few words.
<p>5. Archive</p> <ul style="list-style-type: none"> Archive project documentation. Archive project documents used in the project from start to finish. This includes project files, meeting minutes, and when you sign off with your Project Sponsor, explain what was achieved. 	<p>6. Other Closeout Items</p> <ul style="list-style-type: none"> Hand over project ownership, if necessary. Transfer management of the completed project to the new owner. Settle payments, if necessary. Process outstanding financial information that will help you optimize the budget for the next project.
<p>7. Sign Off with Project Sponsor</p> <ul style="list-style-type: none"> Review the project scope, the deliverables, and all of the completed closeout items. Ensure 100% satisfaction. 	<p>Hooray, you did it!</p>

Can you say 'Yes' to these?

SESSION GOALS:

01

"I know the major **phases of project management.**"

02

"I can use the SDCOE project charter template to **plan** my next project."

03

"I can refer to 3 checklists to help me **execute** and **close** my next project."

<https://epmo.sdcoe.net>



Want more?

1. Workshops – Feb 3, Mar 2, Apr 18
2. Conference – June 22-23, 2023
3. Download templates and job aids and view our training videos
4. View samples in our portfolio

UPCOMING EVENTS

Amplify your skills in 2022-23: See our full list of project management training opportunities for K-12 I.T. departments [here](#).



GET STARTED WITH PROJECT MANAGEMENT: "CHECKLISTS SESSION"

Workshop
October 19, 2022



HOW TO BUILD A PROJECT SCHEDULE

Workshop
November 9, 2022



HOW TO BUILD A PROJECT SCHEDULE

Workshop
February 3, 2023



OCM STRATEGIES FOR YOUR PROJECT

Workshop
March 2, 2023

K-12 PROJECT MANAGEMENT CONFERENCE

On June 22-23, 2023, join us for the K-12 Project Management Conference. This is a great opportunity for all K-12 I.T. departments to improve the quality of our collective IT projects! Check out the recorded sessions and access the handouts.
Password: epmo

RESOURCES

[Intro](#) [Project Charter](#) [Planning](#) [Status Reports](#) [Execution](#) [Closure](#) [More](#)



[Phases of a Project \[PDF\]](#) [How to Serve as a Project Team Member \[PDF\]](#) [Project Roles and Responsibilities \[PDF\]](#)

OUR PORTFOLIO

+ CURRENT PROJECTS

+ PAST PROJECTS



san diego county office of
EDUCATION
FUTURE WITHOUT BOUNDARIES™

THANKS!



**Enterprise
Project
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