



Get Started with Project Management: “Starter Kit Session”

2024 ACSA Classified Education Leaders Council
Virtual Networking Event

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Enterprise Project Management Office (EPMO) | May 15, 2024

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

Q: Share the name of a project you're currently working on or have coming up?

Copper
THE PROJECT MANAGEMENT CAT
THE SCOPE CREEP

The comic strip is divided into three panels. Panel 1: A purple, horned monster with a flame-like aura behind its head. It has a speech bubble that says 'RAW! I am The Scope Creep!' and another at the bottom that says 'I will add more and more things to your project until it becomes a costly and messy failure!'. Panel 2: An orange cat wearing a white shirt and tie is holding a blue can labeled 'CREEP-B-GON'. A purple monster is spraying foam from its mouth onto the can. The cat has a speech bubble that says 'Not so fast, Scope Creep! I have a secret weapon!'. Below the cat, a list of ingredients is shown: 'INGREDIENTS: 1. PROJECT CHARTER 2. CHANGE CONTROL 3. TEAM DILIGENCE'. Panel 3: The orange cat is jumping happily with its arms raised. The purple monster is crying. The cat's speech bubble says 'Hurray! The Scope Creep has been defeated!' and a separate speech bubble at the bottom says '...But I have a feeling it'll be back...'. At the bottom left of the comic is the logo for 'San Diego County Office of EDUCATION' with the tagline 'FUTURE WITHOUT BOUNDARIES'. At the bottom right, it says 'Need to refill your can of CREEP-B-GON? See more K-12 project management resources at epmo.sdcoe.net'.

Need to refill your can of CREEP-B-GON?
See more K-12 project management resources at epmo.sdcoe.net

What's going on in your department?

Q: Now list some project challenges that you have observed or experienced.

Session Goals

01

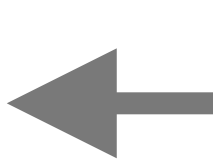
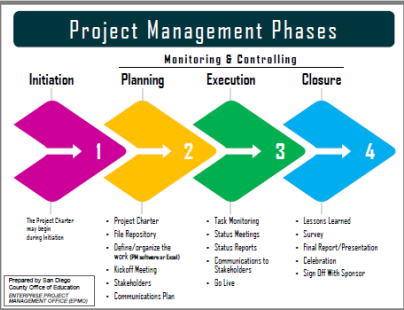
"I know the major **phases of project management.**"

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 _____

Start Date: XXXXXXXX End Date: XXXXXXXX

I. Project Name
Project Name: X

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 status, leads project team team & responsibilities and oversees the project objectives.

Sponsor: The individual member authorized to engage the project and fund it; has ultimate authority and responsibility for the project.

Steering Committee: May assume the overall project management in steering activities and moving the project forward.

Stakeholders: An individual, group, or organization that may affect, be affected by, or be interested in the project.

Others Involved: Any other individuals who are involved and have their own interests.

Project Team: Supports the project manager in performing work activities and managing the project objectives.

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 & not included? What can help manage the expectations?)

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

Project Charter # 1
SOCOE 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 everyone is on the same page.
Plan and conduct meetings, determine action items	
3	Lead status meetings. Meeting duration and frequency will vary by project.
4	Lead standup meetings as needed. These are typically short daily meetings.
Manage the project	
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.
Communicate the status	
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.

SOCOE 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?

Has user acceptance testing been completed?
 Have all issues related to going live been resolved?
 Has the appropriate party (Project Sponsor or other) given approval to proceed with moving the system, service, or product into production?
 If applicable, has your Change Control Board been notified?
 Do we have a backup plan, if needed?
 Has your support staff been trained and/or provided documentation?
 Are they prepared to provide ongoing support?
 If necessary, has the "senior" been added to your support processes?
 Do you have a clear plan for "Day 1" support procedures, and has that been communicated to the team?
 Has training been provided to employees, users, and job aids/voice mail available?
 Has the go live date and other important information been communicated to all project stakeholders?
 Has the go live date and other important information been communicated to all project stakeholders?

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. Get feedback from all stakeholders. Highlight important lessons that will help improve the quality, value, workflow, speed of completion, cost-efficiency, and team morale 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 engage everyone for the next project. Make it fun. Leverage pieces from your final report/presentation - not everyone remembers (or lives) 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. Archive resource docs used in the project from start to finish. This includes project files, meeting minutes, and your Monday.com board. When you sign off with your Project Sponsor, explain what was archived. 	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>

5

Project Management Toolkit

<https://epmo.sdcoe.net>

RESOURCES

Intro Project Charter Project Plan Status Meetings and Reports Execution and Launch Closure

Soft Skills PM Toolkit More


 **Videos**

SDCOE has created an 82-page **Project Management Toolkit** based on Project Management Institute's tools and procedures. This toolkit is free to use and includes samples and templates that are designed to help you complete projects on time, in scope, and under budget.

Files

The toolkit covers these subjects:

Project Management Phases | Project Charter | Roles and Responsibilities | Project Plan | Communications Plan | Kickoff Meeting | Folder Structure | Execution Phase Activities | Status Report | Project Closeout Checklist | Lessons Learned Meeting | Survey | Final Report Presentation | Celebration | Organizational Change Management (OCM)

 [SDCOE Project Management Toolkit v5.0 \[PDF\]](#)



01

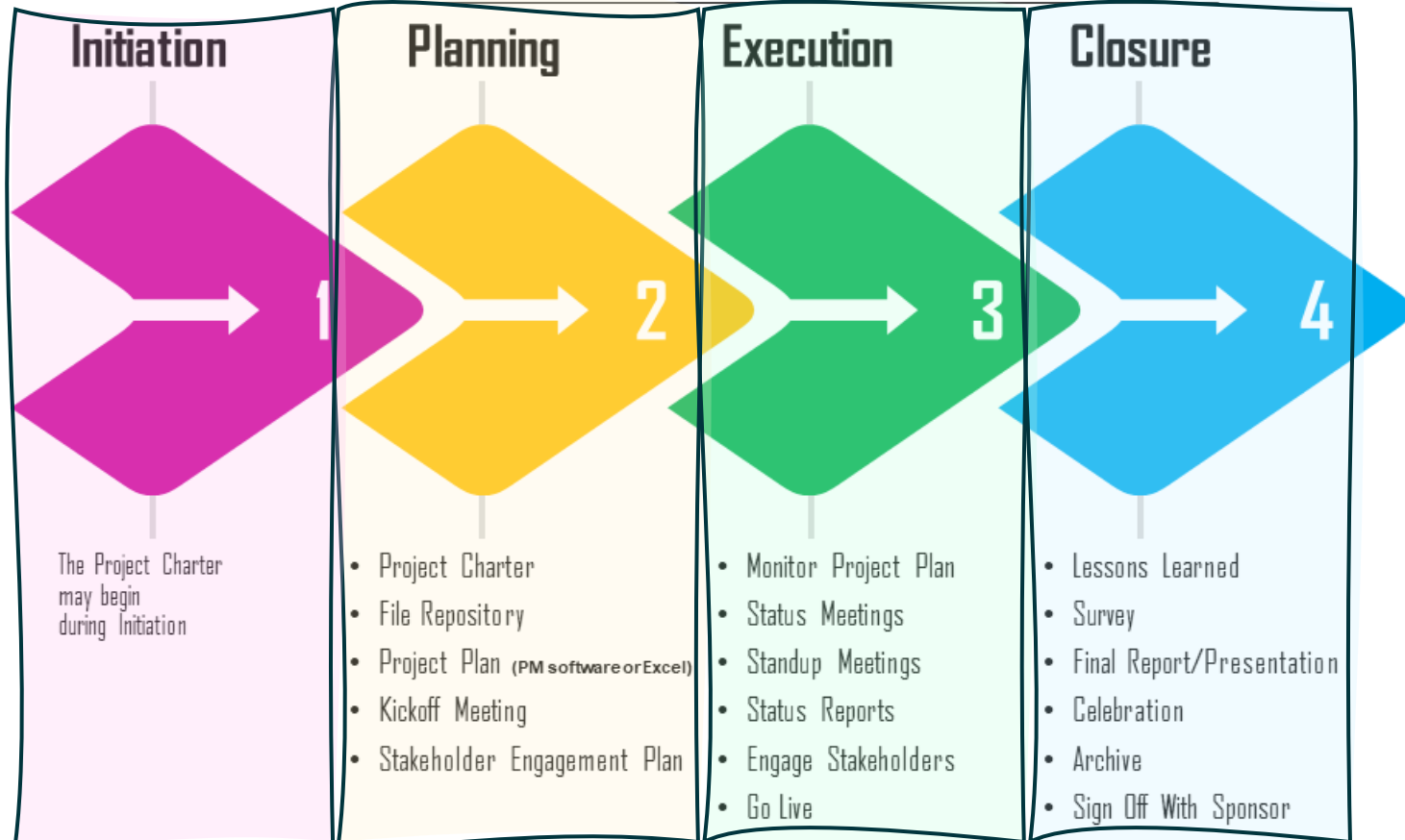
PROJECT MANAGEMENT PHASES

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?

The Project Charter

Authorization + Planning + Expectations + Clarity

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 Select the project with this, sign-off on, lead project team that is responsible for achieving the project objectives. • X	Sponsor The top executive authorized to engage the project and lead it, has ultimate authority and responsibility for the project. • X
Steering Committee Key people that assist the project manager in making decisions and resolve the project's financial issues. <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As needed • X	Stakeholders An individual, group, or organization that may affect or be affected by outcomes of the project. <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As needed • X
Project Team Supports the project manager in performing work of the project to achieve its objectives. <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As needed • X	Others Involved All anyone else who will be involved and share their skills. <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As needed • X

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/When many this will impact? What is included (or not included) that can help manage the expectations?
In scope:
• X
Out of scope:
• X

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

SCOE Integrated Technology Services (ITS) Project Charter | 1

I. Project Name

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

The Project Charter

Authorization + Planning + Expectations + Clarity

Project Charter DRAFT

Project authorized by _____ on _____

I. Project Name

Project Name X	Start Date XXXXXXX	End Date XXXXXXX
----------------	--------------------	------------------

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

<p>Project Manager Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives</p> <ul style="list-style-type: none"> • X 	<p>Sponsor The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project</p> <ul style="list-style-type: none"> • X
<p>Steering Committee Key people that assist the project manager in making decisions and moving the project forward</p> <p><input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed</p> <ul style="list-style-type: none"> • X 	<p>Stakeholders An individual, group, or organization that may affect or be affected by outcome of the project</p> <p><input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed</p>
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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
Whofollow many this will impact? What is included (or not included) that can help manage the expectations?
In scope:
• X
Out of scope:
• X

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

SCOE Integrated Technology Services (ITS) Project Charter | 1

II. Project Organization

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

<p>Project Manager Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives</p> <ul style="list-style-type: none"> • X 	<p>Sponsor The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project</p> <ul style="list-style-type: none"> • X
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The Project Charter

Authorization + Planning + Expectations + Clarity

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

Project Charter DRAFT

Project authorized by _____ on _____

I. Project Name

Project Name X	Start Date XXXXXXX	End Date XXXXXXX
----------------	--------------------	------------------

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

Project Manager Indicates the project team member who is responsible for achieving the project objectives. • X	Sponsor The top executive authorized to engage the project and lead & has ultimate authority and responsibility for the project. • X
Steering Committee Key people that assist the project manager in making decisions and resolve the project financial. <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 outcomes of the project. • X
Project Team Supports the project manager in performing work of the project to achieve its objectives. <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As needed	Others Involved All anyone else who will be involved and share their data. <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

SCOE Integrated Technology Services (ITS) Project Charter | 1

The Project Charter

Authorization + Planning + Expectations + Clarity

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

#B1 Connect the educational experience to the world of work
 #B2 Provide educational opportunities and supports to SDCOE schools and school districts
 #B3 Become the leader and model for innovation
 #B4 Maximize human and operational resources to strengthen the organizational culture of SDCOE

#ITS1 Maximize Customer Success
 #ITS2 Create Value
 #ITS3 Improve Division Efficiencies
 #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.			

SDCOE Integrated Technology Services (ITS) Project Charter | 2

Goals Alignment

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

- #B1 Connect the educational experience to the world of work
 #B2 Provide educational opportunities and supports to SDCOE schools and school districts
 #B3 Become the leader and model for innovation
 #B4 Maximize human and operational resources to strengthen the organizational culture of SDCOE
- #ITS1 Maximize Customer Success
 #ITS2 Create Value
 #ITS3 Improve Division Efficiencies
 #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

The Project Charter

Authorization + Planning + Expectations + Clarity

Goals Alignment
With which Board Goals and ITS Goals does this project align?
 All Connect the educational experience to the needs of state #111 Maximize Customer Success
 #42 Provide education opportunities and exposure to SCOCe schools and virtual classes #112 Create Value
 #43 Maximize the value and quality of resources #113 Maximize Student Success #114 Maximize Student and Operational Success to strengthen the organizational culture of SCOCe #115 Maximize Customer Satisfaction

Objective/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.			

SCOCe Integrated Technology Services (ITS) Project Charter | 2

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.			

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 project's purpose?
What are the goals?

(WHERE)

- Which departments are involved?
etc.?

WHEN

- What is the timeline?

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.)?

Q: How can a project charter help your projects?

03



EXECUTION PHASE CHECKLIST

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



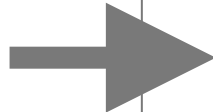
PROJECT MANAGEMENT TOOLKIT











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

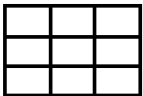
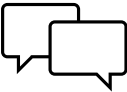
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Key Project Management Activities During Execution		
Monitor progress, keep track of the calendar and milestones		
1		Monitor the _____ frequently. <i>Team members should update their status and add new tasks.</i>
2		Check in with _____ as needed. <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?


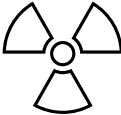

Key Activities of the Execution Phase

Monitor progress, keep track of the calendar and milestones		
1		Monitor the project plan frequently. <i>Team members should update their status and add new tasks.</i>
2		Check in with team members 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		Prepare for <u>Go Live</u> . <i>Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.</i>

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.

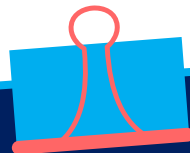
- 9  **Communicate up and out when needed.**
Stay in touch with your steering committee and stakeholders.

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 budgeting system.



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 the launch of a new initiative?

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.



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.
- **EPMO Only:** Send the "How Did We Do?" Customer Satisfaction survey to the Project Sponsor and Project Team.



7. Sign Off with Project Sponsor

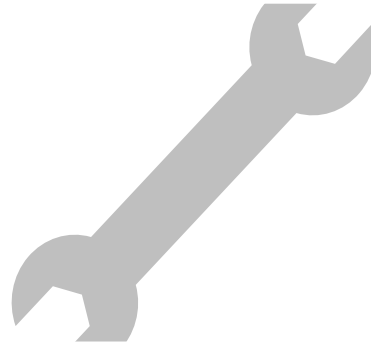
- Review the project scope, the deliverables, and all of the completed closeout items. Ensure 100% satisfaction.

Hooray, you did it!

Lessons Learned



What worked
well?



Where can we
improve?



What are you
proud of?

Stakeholder Survey

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%	73%	54% ↓	71% ↑
Use Duo Mobile as primary method	31%	25%	54% ↑	32% ↓
Use their personal mobile phone for MFA	78%	58% ↓	71%	64%
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

- ← How do they use the product?
- ← Do they think it's easy to use?
- ← Do they understand why we did this project?
- ← What support methods did they use?
- ← Are they satisfied with our support?

Welcome and Topics

SDCOE Secure Access Project: Final Presentation

Presented by the SDCOE Enterprise Project Management Office (EMPO)

SDCOE Secure Access Project
AGENDA

1. Project Recap
2. Lessons Learned
3. Survey Results
4. What's Left

1

2

Project Recap

USE INFO FROM YOUR PROJECT CHARTER...

SDCOE Secure Access Project

Overall Goal
In 2023, SDCOE will implement MFA (multi-factor authentication) to protect the state of our staff, our students, and our community partners, and where applicable, for data use and data about our students and community partners.

Objectives / Success Criteria
Every government computing user (SDCOE employees only) will have a 100% success rate in using MFA. All government computing users (SDCOE employees only) will have a 100% success rate in using MFA. All government computing users (SDCOE employees only) will have a 100% success rate in using MFA.

This was a division-wide effort

Our Project Team

IT Services, HR, Finance, Operations, Legal, Compliance, Security, Training, Communications, Customer Support, External Vendors

3

4



5

What We Delivered

- 1. MFA (Multi-Factor Authentication)
- 2. Training
- 3. Support
- 4. Security
- 5. Compliance
- 6. Communication

6

How the Work Tied To Our Organization Goals

SDCOE BOARD GOALS 3.6.4

ITS GOALS 1.2.6.4

7

Lessons Learned

SUMMARIZE YOUR LESSONS LEARNED...

MFA Lessons Learned

- What worked well?
 - Clear messaging
 - Multiple support channels
 - Clear instructions
 - Clear expectations
- What we learned?
 - Clear messaging
 - Multiple support channels
 - Clear instructions
 - Clear expectations
- What we are proud of?
 - Clear messaging
 - Multiple support channels
 - Clear instructions
 - Clear expectations

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What Worked Well

1. Having a clear timeline and milestones
2. Having a clear communication plan
3. Having a clear point of contact
4. Having a clear escalation path
5. Having a clear feedback loop
6. Having a clear reporting mechanism
7. Having a clear documentation process
8. Having a clear review process

9

Where We Can Improve

1. Having a clear timeline and milestones
2. Having a clear communication plan
3. Having a clear point of contact
4. Having a clear escalation path
5. Having a clear feedback loop
6. Having a clear reporting mechanism
7. Having a clear documentation process
8. Having a clear review process

10

What We Are Proud Of

1. The clear communication plan
2. The clear timeline and milestones
3. The clear point of contact
4. The clear escalation path
5. The clear feedback loop
6. The clear reporting mechanism
7. The clear documentation process
8. The clear review process

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What We Are Proud Of

Collaboration

Partnership

Teamwork

Trust

Respect

Openness

Transparency

Accountability

Ownership

Commitment

Passion

Energy

Enthusiasm

Optimism

Positivity

Resilience

Perseverance

Determination

Focus

Concentration

Attention

Alertness

Awareness

Observation

Insight

Understanding

Knowledge

Wisdom

Experience

Expertise

Proficiency

Competence

Capability

Capacity

Potential

Strength

Power

Influence

Impact

Legacy

Contribution

Value

Meaning

Purpose

Significance

Importance

Relevance

Usefulness

Benefit

Advantage

Merit

Quality

Character

Integrity

Honesty

Trustworthiness

Reliability

Consistency

Stability

Endurance

Persistence

Perseverance

Stamina

Strength

Power

Influence

Impact

Legacy

Contribution

Value

Meaning

Purpose

Significance

Importance

Relevance

Usefulness

Benefit

Advantage

Merit

Quality

Character

Integrity

Honesty

Trustworthiness

Reliability

Consistency

Stability

Endurance

Persistence

Perseverance

Stamina

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Survey Results

SUMMARIZE YOUR SURVEY FINDINGS...

MFA Survey Results

Surveys Deployed

Phase	Start	End	Count
1A - Managers	1/15/23	2/15/23	104
1B - Staff	2/15/23	3/15/23	175
2 - Managers	3/15/23	4/15/23	205
3 - Staff	4/15/23	5/15/23	405

Survey Tool

20-question survey developed in Microsoft Forms, sent via email, used each phase

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Across all phases, a high percentage of SDCOE employees agreed

- The MFA tool is easy to use and provides the necessary security.
- The MFA tool is user-friendly and easy to use.
- The MFA tool is secure and provides the necessary security.
- The MFA tool is reliable and provides the necessary security.
- The MFA tool is effective and provides the necessary security.

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Comparison Chart

Phase	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
1A - Managers	0%	0%	0%	100%	0%
1B - Staff	0%	0%	0%	100%	0%
2 - Managers	0%	0%	0%	100%	0%
3 - Staff	0%	0%	0%	100%	0%

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Wrap Up **SHARE WHAT'S LEFT**

SDCOE Secure Access Project

What's Left?

- 1. Open Floor Discussion
- 2. Any thoughts, comments, or questions you'd like to discuss?
- 3. Any meeting agenda items to review and sign off

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Final Report







Celebration



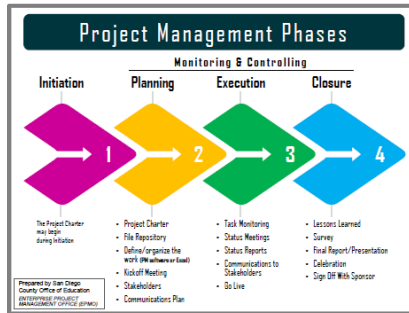
PROJECT MANAGEMENT TOOLKIT

Project Closeout Checklist

Use this checklist to help you close out your project.

 <h4>1. Lessons Learned</h4> <ul style="list-style-type: none"><input type="checkbox"/> Identify and document lessons learned.<ul style="list-style-type: none">• 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.	 <h4>2. Survey</h4> <ul style="list-style-type: none"><input type="checkbox"/> Assist the team with conducting a survey.<ul style="list-style-type: none">• Determine if the project objectives were met.• Measure satisfaction.• Use the results in your Final Presentation.
 <h4>3. Final Presentation</h4> <ul style="list-style-type: none"><input type="checkbox"/> Create a final report or presentation and use it to conduct a project closeout meeting.<ul style="list-style-type: none">• 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.	 <h4>4. Celebration</h4> <ul style="list-style-type: none"><input type="checkbox"/> A celebration and camaraderie can help energize everyone for the next project.<ul style="list-style-type: none">• 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
 <h4>5. Archive</h4> <ul style="list-style-type: none"><input type="checkbox"/> Archive project documentation.<ul style="list-style-type: none">• 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.	
 <h4>7. Sign Off with Project Sponsor</h4> <ul style="list-style-type: none"><input type="checkbox"/> Review the project scope, the deliverables, and all of the completed closeout items. Ensure 100% satisfaction.	

Q: Why do you think it's important to close out your projects?



Q: Which tool are you most excited to try?

PLANNING

EXECUTION

CLOSURE

Project Charter DRAFT

Project authorized by _____ on _____

Start Date: XXXXXXXX End Date: XXXXXXXX

I. Project Name

Project Name: X

II. Project Organization

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

Project Manager: Conducts day-to-day work, reports on status, leads project team, has the authority to activate the project resources.

Sponsor: The individual member authorized to engage the project and fund it; has ultimate responsibility for the project.

Steering Committee: May oversee the overall project management in strategic decisions and receive the project budget.

Project Team: Performs the project manager's performing work; performs project management activities.

Stakeholders: Individuals, groups, or organizations that may be affected by the outcome of the project.

Others Involved: All other individuals and organizations that may be involved and have an interest in the project.

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?

Scope: How many things will this project 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

SDDOE Integrated Technology Services (ITS)

PROJECT MANAGEMENT TOOLKIT

Key Activities of the Execution Phase

Key Project Management Activities During Execution	
1	Monitor progress, keep track of the calendar
2	Monitor the project plan frequently. Team members should update their status.
3	Check in with team members as needed. Establish rapport with the team; make sure everyone is on the same page.
4	Lead status meetings. Meeting duration and frequency will vary by project.
5	Lead standup meetings as needed. These are typically short daily meetings.
6	Identify new activities or changes. Watch out for scope creep (new tasks).
7	Monitor risks. Quickly address any risks.
8	Monitor budget, if required. Track project costs.
9	Prepare and send status reports. Capture accomplishments.
10	Communicate up and out when needed. Stay in touch with your steering committee and sponsor.

Go Live Checklist (Starting Point)

Testing and Sign Off

Support Team

Training & Communication

Go / No Go Meeting: Are we ready? Is it a go?

SDDOE Integrated Technology Services (ITS) Key Activities of the Execution Phase

PROJECT MANAGEMENT TOOLKIT

Project Closeout Checklist

Use this checklist to help you close out your project.

1. Lessons Learned	2. Survey
3. Final Presentation	4. Celebration
5. Archive	6. Other Closeout Items
7. Sign Off with Project Sponsor	

Hooray, you did it!

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.”

Project Management Toolkit

<https://epmo.sdcoe.net>

RESOURCES

Intro Project Charter Project Plan Status Meetings and Reports Execution and Launch Closure

Soft Skills **PM Toolkit** More


 **Videos**

SDCOE has created an 82-page **Project Management Toolkit** based on Project Management Institute's tools and procedures. This toolkit is free to use and includes samples and templates that are designed to help you complete projects on time, in scope, and under budget.

Files

The toolkit covers these subjects:

Project Management Phases | Project Charter | Roles and Responsibilities | Project Plan | Communications Plan | Kickoff Meeting | Folder Structure | Execution Phase Activities | Status Report | Project Closeout Checklist | Lessons Learned Meeting | Survey | Final Report Presentation | Celebration | Organizational Change Management (OCM)

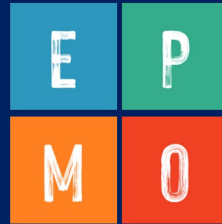
 [SDCOE Project Management Toolkit v5.0 \[PDF\]](#)





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EDUCATION
FUTURE WITHOUT BOUNDARIES™

THANKS!



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epmo.sdcoe.net



EPMO@sdcoe.net