Get Started with Project Management: “Starter Kit Session”

2024 ACSA Classified Education Leaders Institute
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

Live long, and provide status reports.
-Spock
Star Trek

Candace Wong
Project Management Assistant
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
What’s going on in your department?

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

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

PLANNING PHASE
EXECUTION PHASE
CLOSURE PHASE
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

<table>
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<tr>
<th>Intro</th>
<th>Project Charter</th>
<th>Project Plan</th>
<th>Status Meetings and Reports</th>
<th>Execution and Launch</th>
<th>Closure</th>
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<td>Soft Skills</td>
<td><strong>PM Toolkit</strong></td>
<td>More</td>
<td>Videos</td>
<td>Files</td>
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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.

The toolkit covers these subjects:

- Project Management Phases
- Project Charter
- Roles and Responsibilities
- Project Plan
- Communications Plan
- Kickoff Meeting
- Folder Management
- 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]
PROJECT MANAGEMENT PHASES

Planning, Execution, and Closure
Project Management Phases

**Initiation**
- The Project Charter may begin during Initiation

1. **Planning**
- Project Charter
- File Repository
- Project Plan (PM software or Excel)
- Kickoff Meeting
- Stakeholder Engagement Plan

2. **Execution**
- Monitor Project Plan
- Status Meetings
- Standup Meetings
- Status Reports
- Engage Stakeholders
- Go Live

**Closure**
- Lessons Learned
- Survey
- Final Report/Presentation
- Celebration
- Archive
- Sign Off With Sponsor

*Q: Which of these are you already using?*
*Q: Which are brand new to you?*
THE PROJECT CHARTER

What type of information goes in a project charter? Why do we write one?
The Project Charter
Authorization • Planning • Expectations • Clarity

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.

<table>
<thead>
<tr>
<th>Role</th>
<th>Frequency</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Project Manager</strong></td>
<td></td>
<td>Oversees the project work plan, reports on status, leads project team that is responsible for achieving the project objectives</td>
</tr>
<tr>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>Steering Committee</strong></td>
<td>Weekly, Bi-Weekly</td>
<td>Key people that assist the project manager in making decisions and moving the project forward</td>
</tr>
<tr>
<td></td>
<td>Monthly, As Needed</td>
<td></td>
</tr>
<tr>
<td><strong>Sponsor</strong></td>
<td></td>
<td>The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project</td>
</tr>
<tr>
<td></td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>Stakeholders</strong></td>
<td></td>
<td>An individual, group, or organization that may affect or be affected by outcomes of the project</td>
</tr>
<tr>
<td></td>
<td>Weekly, Bi-Weekly</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Monthly, As Needed</td>
<td></td>
</tr>
<tr>
<td><strong>Project Team</strong></td>
<td></td>
<td>Supports the project manager in performing work of the project to achieve its objectives</td>
</tr>
<tr>
<td></td>
<td>Weekly, Bi-Weekly</td>
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<tr>
<td></td>
<td>Monthly, As Needed</td>
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</tr>
<tr>
<td><strong>Others Involved</strong></td>
<td></td>
<td>List anyone else who will be involved and state their roles</td>
</tr>
<tr>
<td></td>
<td>Weekly, Bi-Weekly</td>
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<tr>
<td></td>
<td>Monthly, As Needed</td>
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</tbody>
</table>
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
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 SDCCD schools and school districts
☐ #B3 Become the leader and model for innovation
☐ #B4 Maximize human and operational resources to strengthen the organizational culture of SDCCD
☐ #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.

<table>
<thead>
<tr>
<th>Phase/Major Milestone</th>
<th>Responsible (Lead)</th>
<th>Start Date or Month Begin</th>
<th>End Date or Month End</th>
</tr>
</thead>
<tbody>
<tr>
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<tr>
<td>1.</td>
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<td>2.</td>
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<tr>
<td>3.</td>
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<tr>
<td>4.</td>
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<td>5.</td>
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<td>6.</td>
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<tr>
<td>9.</td>
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<tr>
<td>10.</td>
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</tbody>
</table>
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.)?

Q: How does the project charter facilitate communication and involvement of stakeholders?
EXECUTION PHASE CHECKLIST

All that project planning pays off when you are in Execution!
Please find this page!

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

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
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</thead>
</table>
| **1** | ![Grid Icon] | Monitor the **project plan** frequently.  
*Team members should update their status and add new tasks.* |
| **2** | ![Chat Icon] | Check in with **team members** as needed.  
*Establish rapport with the team; make sure there are no roadblocks.* |
## Key Activities of the Execution Phase

<table>
<thead>
<tr>
<th></th>
<th>Plan and conduct meetings, determine action items and assign next steps</th>
</tr>
</thead>
</table>
| 3 | ![status.png](status.png) Lead **status** meetings.  
*Meeting duration and frequency will vary by project.* |
| 4 | ![standup.png](standup.png) Lead **standup** meetings as needed.  
*These are typically short daily meetings (15 min).* |
## Key Activities of the Execution Phase

<table>
<thead>
<tr>
<th></th>
<th>Manage the project</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Identify <strong><strong>new</strong></strong> activities or adjustments to the plan.</td>
</tr>
<tr>
<td></td>
<td><em>Watch out for scope creep (new scope added after the project starts)</em>.</td>
</tr>
<tr>
<td>6</td>
<td>Monitor <strong><strong>risks</strong></strong>.</td>
</tr>
<tr>
<td></td>
<td><em>Quickly address any risks.</em></td>
</tr>
<tr>
<td>7</td>
<td>Monitor <strong><strong>budget</strong></strong>), if required.</td>
</tr>
<tr>
<td></td>
<td><em>Track project costs.</em></td>
</tr>
</tbody>
</table>
Key Activities of the Execution Phase

<table>
<thead>
<tr>
<th></th>
<th>Communicate the status of your project</th>
</tr>
</thead>
</table>
| 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 sponsor, steering committee, and stakeholders. |
### Key Activities of the Execution Phase

<table>
<thead>
<tr>
<th>Go Live (Become operational)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare for Go Live.</td>
</tr>
<tr>
<td>10</td>
</tr>
<tr>
<td>Sign off on testing (if needed), conduct training (if needed), send communications, conduct Go/No Go meeting, be ready for support.</td>
</tr>
</tbody>
</table>
Take a look at the list...

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

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

Q: What is usually your top area of focus before the launch of a new initiative?
# Go Live Checklist

**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?

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

<table>
<thead>
<tr>
<th></th>
<th>ITS Managers PHASE 1A</th>
<th>ITS Staff PHASE 1B</th>
<th>SDCOE Managers PHASE 2</th>
<th>SDCOE Staff PHASE 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use YubiKey as primary method</td>
<td>75%</td>
<td>73%</td>
<td>54%</td>
<td>71%</td>
</tr>
<tr>
<td>Use Duo Mobile as primary method</td>
<td>31%</td>
<td>25%</td>
<td>54%</td>
<td>32%</td>
</tr>
<tr>
<td>Use their personal mobile phone for MFA</td>
<td>78%</td>
<td>58%</td>
<td>71%</td>
<td>64%</td>
</tr>
</tbody>
</table>
| 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 3.15 |
| Methods of support used | 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 |

Scores of 3.0 indicate agreement; those that approach 4.0 indicate strong agreement. † † The arrows denote a difference of 10% or more.
Final Report
Q: Do you have an idea for a project celebration?
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### 7. Sign Off with Project Sponsor
- 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?
Can you say ‘Yes’ to these?

SESSION GOALS:

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02
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THANKS!

EP
MO

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EPMO@sdcoe.net