



Get Started with Project Management: “Starter Kit Session”

2025 COE Grant Professionals Network Meeting

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Enterprise Project Management Office (EPMO) | April 18, 2025

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 speech bubble above the cat 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. A speech bubble above it says 'Hurray! The Scope Creep has been defeated!'. A speech bubble below it says '...But I have a feeling it'll be back...'. The purple monster is in the background, looking sad and crying.

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

EDUCATION
Future Without Boundaries

What's going on in your department?

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

Session Goals

01

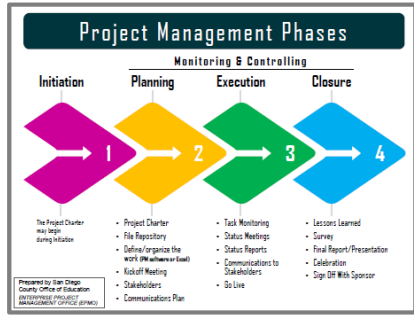
"I know the major **phases of project management.**"

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, has responsibility for the project's success.

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 certain phases and moving the project forward.

Project Team: Supports the project manager in performing work and providing resources to the project.

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

Others Involved: Individuals, groups, or 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

SOOCE 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 necessary. 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?

SOOCE 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.

<p>1. Lessons Learned</p> <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 efficiency, value, workflow, speed of completion, cost-effectiveness, and team morale of the next project. Use this information in your Final Presentation. 	<p>2. Survey</p> <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.
<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 engage everyone for the next project. Make it fun. Leverage pieces from your final report/presentation - not everyone's members (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.
<p>5. Archive</p> <ul style="list-style-type: none"> Archive project documentation. Archive resource files 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. 	<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 invoices. Note down variances, cost efficiencies, and other 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>

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

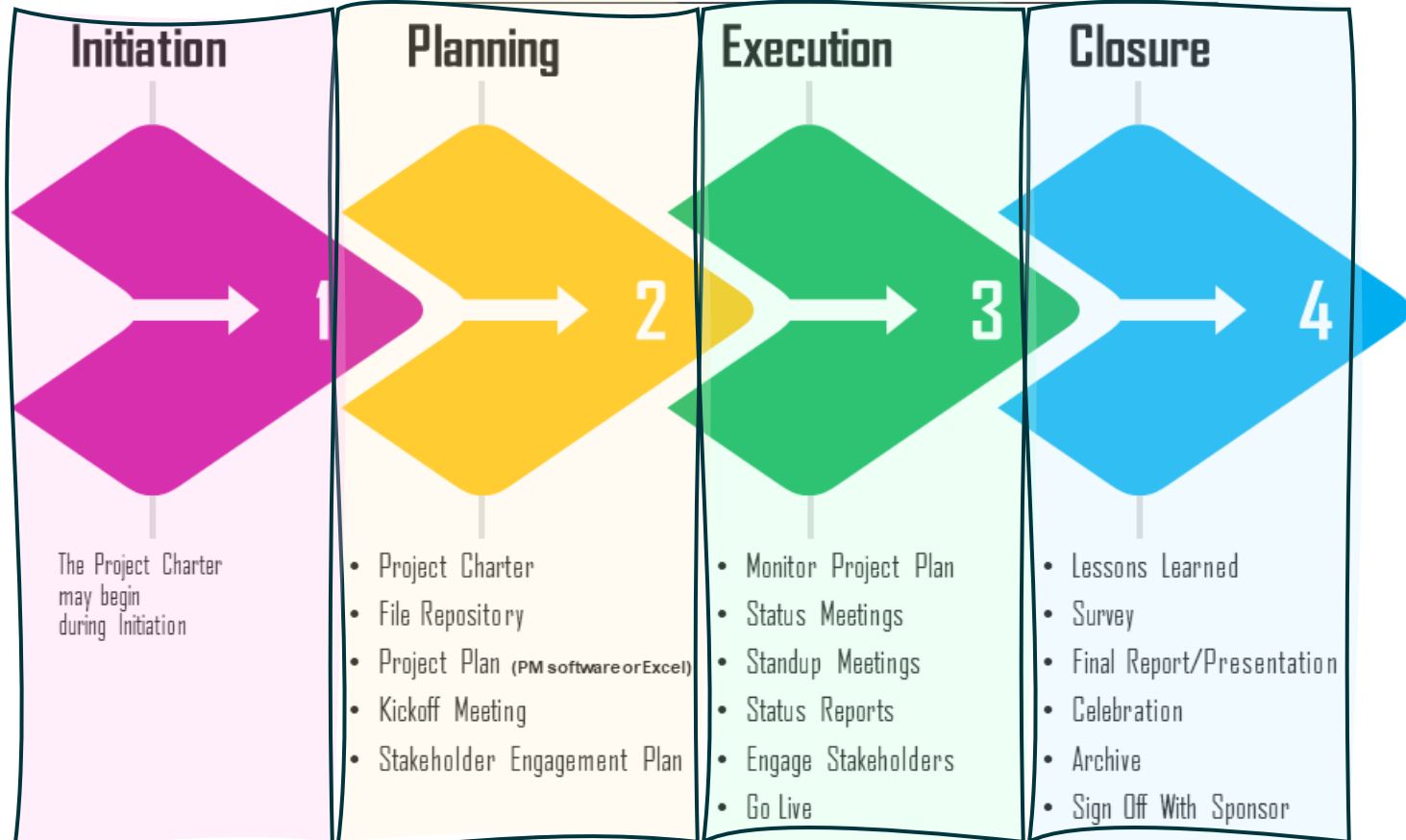
PROJECT MANAGEMENT PHASES

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?

How to Prepare a Project Charter

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 <i>Oversees the project work plan, reports on status; leads project team that is responsible for achieving the project objectives</i> <ul style="list-style-type: none">• X	Sponsor <i>The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project</i> <ul style="list-style-type: none">• X
Steering Committee <i>Key people that assist the project manager in making decisions and moving the project forward</i> <ul style="list-style-type: none">• X <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed	Stakeholders <i>An individual, group, or organization that may affect or be affected by outcome of the project</i> <ul style="list-style-type: none">• X <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed
Project Team <i>Supports the project manager in performing work of the project to achieve its objectives</i> <ul style="list-style-type: none">• X <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed	Others Involved <i>List anyone else who will be involved and state their roles</i> <ul style="list-style-type: none">• X <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed

III. Project Details

Project Description <i>Write a brief description of this project in simple, easy-to-understand terms. What are you trying to accomplish? Why?</i> <p>X</p>
Scope <i>Who/how many this will impact? What is included (or not included) that can help manage the expectations?</i> <p><i>In scope:</i></p> <ul style="list-style-type: none">• X <p><i>Out of scope:</i></p> <ul style="list-style-type: none">• X
Deliverables <i>Which products or results do you expect upon completion of the project?</i> <ul style="list-style-type: none">• X

Part I: Project Name

- Write the official name of the project, the start date, and end date. Remember, what makes a project a project is that it has a start and *end* date!
- Establish a realistic timeframe.
- After you complete Part IV Schedule, you might want to circle back to Part I and make sure your date range still matches.

Part II: Project Organization

- List anyone who will be involved in the project. Are there departments outside of yours to consider? School staff? External/vendors?
- If you look at the top of each box there is a short description of each role. In your toolkit, on the 3rd tab, there are more details about Project Roles and Responsibilities.

How to Prepare a Project Charter

Project Charter **DRAFT**



Project authorized by _____ on _____

I. Project Name

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

Part III: Project Details

- **Project Description:** Write a description of the project in simple, easy-to-understand terms. This is where you want to put “the why.” Include a little bit of backstory for context and what the desired outcome is.
- **Scope:** List what *in scope* as well as what’s *out of scope*. Being specific about scope will help manage expectations.
- **Deliverables:** List the products or results you expect upon completion of the project.

How to Prepare a Project Charter

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

Part III: Project Details

- **Goals Alignment:** State how your project aligns with your organization's Board Goals and your IT Department Goals
- **Objectives/Success Criteria:** Think about how you will know if your project was a success. For the items you list here, there should be some way to **measure** or **have evidence** that your project was successful. *Examples: Improved efficiency, improved process, increased satisfaction.*
- **Risks:** Make a list of potential risks and include how you will mitigate the risk. Sometimes doing this helps you identify new project needs.

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.			

How to Prepare a Project Charter

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.

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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 Party	Start Date or	End Date or
-----------------------	-------------------	---------------	-------------

Examples of Phases in IT Projects:

1. Discovery or Planning (Requirements, Analysis, Communication, etc.)
2. Design
3. Development or Build
4. Testing (include UAT and Sign Off, as needed)
5. Training
6. Pre-Go Live Activities (include Communication)
7. Go Live / Implementation
8. Post-Go Live (include Support, as needed)
9. Closure (Lessons Learned, Surveys, Final Report, Celebration, etc.)

This list is not meant to be all inclusive and not every phase may be needed.

Part IV: Project Schedule & Milestones

- Think through the phases and major milestones for your project.
- You will not know EVERY task and activity – try to gather as much as you can to create a realistic schedule and phases.
- Remember to include time at the end to close out your project.
- Keep in mind that you will use Part IV to build out your project plan later.

How to Prepare a Project Charter

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.

Part V: Tools

- Consider which tools are needed for this project. You can make these match the tools your organization uses. For example, if you are using Google Drive, make sure you identify the location and who needs access.

When you're done...

- Meet with your Project Sponsor and review the Project Charter
- Obtain authorization to proceed
- Type their name and authorization date at the top of the Project Charter; remove 'DRAFT'

Project Charter DRAFT

Project authorized by _____ on _____

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?
- What are the goals?

(WHERE)

- Which departments?
- 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

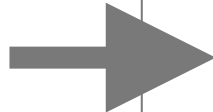
What are the key activities of the Execution Phase?











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

**WORD
BANK**

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

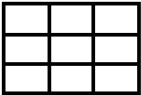
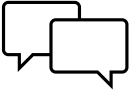
Please
find
this page!



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 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>


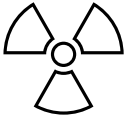

budget
 Go Live
 new
 project plan
 risks
 standup
 status
 status reports
 team members
 up / out

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>



budget
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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>


budget
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up / out

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>

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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>



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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.

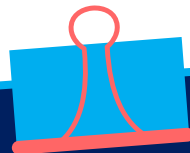
- 9  **Communicate up and out when needed.**
Stay in touch with your steering committee and stakeholders.

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

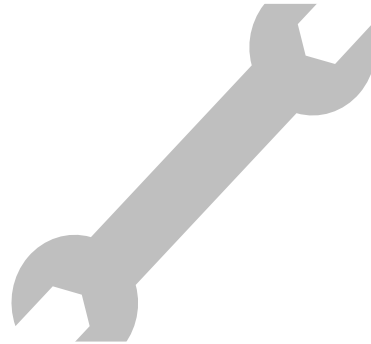
- Review the project scope, the deliverables, and all of the completed closeout items. Ensure 100% satisfaction.**

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% ↑	33% ↑
Use their personal mobile device	10%	10%	10%	10%
<p>1) Please circle how you feel about the online application process: <i>Encierre en un círculo cómo se siente acerca del proceso de solicitud en línea:</i></p> 				
Methods of support used ✓ = highest compared to other phases	Electronic job aid = 41% Asked a colleague = 41% ✓ ServiceNow ticket = 28% MFA Helpline = 3%	Electronic job aid = 30% Asked a colleague = 36% ServiceNow ticket = 16% MFA Helpline = 3%	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

EDUCATION INTEGRATED TECHNOLOGY
SDCOE Secure Access Project: Final Presentation
Presented to the SDCOE Executive Project Management Office (EMPO)
November 1, 2023

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...

Project Recap
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, our data use and data about our students and community partners.
Objectives / Success Criteria
Every government computing device SDCOE employee will:
- Have a 100% success rate in using MFA to access SDCOE systems.
- Have a 100% success rate in using MFA to access SDCOE systems.
- Have a 100% success rate in using MFA to access SDCOE systems.

Project Recap
This was a division-wide effort



Project Recap
What We Delivered

Project Recap
How the Work Tied To Our Organization Goals
SDCOE BOARD GOALS 3.6.4
SDCOE BOARD GOALS 1.2.6.4
ITS GOALS 1.2.6.4

3

4

5

6

7

Lessons Learned

SUMMARIZE YOUR LESSONS LEARNED...

Lessons Learned
MFA Lessons Learned

Lessons Learned
What Worked Well

Lessons Learned
Where We Can Improve

Lessons Learned
What We Are Proud Of

Lessons Learned
What We Are Proud Of

8

9

10

11

12

Survey Results

SUMMARIZE YOUR SURVEY FINDINGS...

Survey Results
MFA Survey Results

Survey Results
Across all phases, a high percentage of SDCOE employees agreed

Survey Item	Phase 1A	Phase 1B	Phase 2	Phase 3	Phase 4
Strongly Disagree	0%	0%	0%	0%	0%
Disagree	0%	0%	0%	0%	0%
Neutral	0%	0%	0%	0%	0%
Agree	100%	100%	100%	100%	100%
Strongly Agree	0%	0%	0%	0%	0%

13

14

15

Wrap Up

SHARE WHAT'S LEFT

SDCOE Secure Access Project
What's Left?
- Open Floor Discussion
- Any thoughts, comments, or questions you'd like to discuss?
- Any meeting agenda items to review and sign off

16

Final Report







Celebration



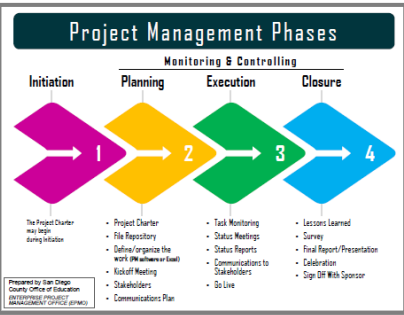
PROJECT MANAGEMENT TOOLKIT

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 _____

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 day-to-day work, reports on status, leads project team that is responsible for achieving 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 certain situations and receive the project budget.

Project Team
Specialists in the project manager's performing work activities and managing the project activities.

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 things 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
SDDOE Integrated Technology Services (ITS)

PROJECT MANAGEMENT TOOLKIT

Key Activities of the Execution Phase

1 Monitor progress, keep track of the calendar
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.

3 Lead status meetings. Meeting duration and frequency will vary by project.

4 Lead standup meetings as needed. These are typically short daily meetings.

5 Identify new activities or changes. Watch out for scope creep (new requirements).

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.

SDDOE 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?

Have user acceptance testing been completed?
 Have all issues related to going live been resolved?
 Have 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?
 Have 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/need to be engaged?
 Do you have a clear plan for "Day 1" support requirements, and has that been communicated to the team?
 Have training been provided to employees, and are you using available resources?
 Have the go live date and other important information been communicated to the project stakeholders?
 Have you archived project documentation?
 Have you signed off with your Project Sponsor, explain what was achieved.

PROJECT MANAGEMENT TOOLKIT

Project Closeout Checklist

Use this checklist to help you close out your project.

1. Lessons Learned
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, efficiency, and team morale 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 Next.
 • Present the final report prior to conducting your Celebration.

4. Celebration
A celebration and camaraderie can help energize everyone for the next project.
 • Make it fun.
 • Leverage prizes from your final presentation – not everyone (members 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
Archive project documentation.
 • Archive management docs 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.

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 financial information that will help you optimize the budget for the next project.

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!

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)

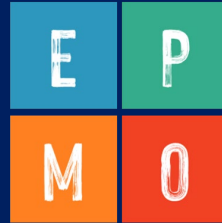
 [SDCOE Project Management Toolkit v5.0 \[PDF\]](#)





san diego county office of
EDUCATION
FUTURE WITHOUT BOUNDARIES™

THANKS!



Enterprise

Project

Management

Office



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