

PROJECT MANAGEMENT DIAGNOSTIC TOOL

How much project management do I need for my project?

This is a diagnostic tool created by the San Diego County Office of Education to help you right-size project management for your project. At Step 1, you will consider 7 questions to determine how much project management you need (none, lightweight, moderate, or full). Step 2 is intended to help you identify which specific project management tools and techniques you deem are required. Remember, project management should be something that adds value, makes the work easier (more efficient, better organized, better communicated, etc.), and helps you have successful outcomes.

Step 1: Project Snapshot (Y/N Questions)

Directions: Answer these Yes/No questions about your project.

	YES	NO
1. Is the project longer than 6 weeks in duration?		
2. Is there a hard due date or high risk if delayed?		
3. Will the project impact a large number of staff or stakeholders?		
4. Does the project have high visibility or high stakes?		
5. Is there significant training or organizational change management needed?		
6. Is this project cross-departmental or multi-team?		
7. Does the project involve external vendors, contracts, or purchases?		

- **If all answers are NO**, your project may only need *basic coordination*. It's likely you can get by with your day-to-day tools like Outlook/Google calendar, email and chat messages, and Word/Google Docs to manage the project.
- **If you answer YES to 1-2**, you may only need *lightweight project management*. Go to Step 2 to consider which specific tools and techniques will help you.
- **If you answer YES to 3+**, your project probably has higher complexity or risk, and you likely need *moderate to full project management*. Go to Step 2 to consider which specific tools and techniques will help you.

Step 2: What Tools & Techniques Will I Require?

Directions: Use this chart to decide which project management tools and techniques you deem are required, nice to have, or not needed, based on the complexity and risk of your project.

PM Tools & Techniques	Likely required if...	Not Needed NO	Nice to Have MAYBE	Required YES
1. Project Charter	If you need clarity on project goals, scope, deliverables, who's involved, risks, and timeline/milestone dates NOTE: A "lite" project charter is available (1 page)		☐ Full ☐ "Lite"	☐ Full ☐ "Lite"
2. Project Schedule or Calendar	If visualizing the schedule is helpful, either as a list or in calendar view			
3. Project Plan (PM software or Excel)	If there are multiple phases, tasks, and/or team members responsible; if it will help you monitor and track the project			
4. Kickoff Meeting	If communicating the vision and "who, what, where, when, why, and how" of your project is beneficial; if team members are from different groups			
5. File Repository	Always useful for any size project			
6. Stakeholder / Communication Plan	If the project impacts others, especially if organizational change is involved			
7. Status Meetings	If the project runs more than 6 weeks (as a guideline) or includes multiple contributors			
8. Standup Meetings	If short, daily planning meetings are helpful during your project (examples: Development or Testing)			
9. Status Reports	If the Sponsor and others will benefit from a weekly, bi-weekly, or monthly report			
10. Training Plan	If staff or users need new skills or knowledge to use what's delivered			
11. Support Plan	If support staff will be involved or if staff/users will need ongoing support			
12. Go Live Plan	If you are launching (or changing) a system, tool, or process			
13. Lessons Learned Documentation	If there is value in repeating or avoiding what happened next time; if it will support continuous improvement			
14. Stakeholder Survey	If stakeholder or user feedback is important to improve or assess success			
15. Final Report / Presentation	If reporting out, documenting the project, or demonstrating value is needed			
16. Celebration	Always good morale booster, especially when impact/outcomes are shared with the project team; if providing closure for the team is helpful			
17. Archive	If artifacts need to be reused or referenced in the future			
18. Sponsor Sign-off	If formal approval is needed to close the project or mark success			