



## **CONCEPT TOOLKIT**

### **► Concept Statement**

Description

Need Statement

Benefit Statement

Consistency

Impact to Other Agencies

Solution Alternatives

Recommendation

Project Approach (if known)

### **► Sizing Estimate**

Effort Hours

Percentage of Project Management Effort

Work Months

Estimating Summary



## CA-PMM TOOLKIT

### Project Information

#### Main Menu

- ▶ **Initiating**

- ▶ **Project Charter**

- ▶ **General Information**

- Background

- Objectives

- Measurement

- Solution

- High Level Business Requirements

- Preliminary Scope Statement

- Current Scope

- Future Opportunities

- Out of Scope

- Summary Milestones

- Impact Assessment

- Deadline

- ▶ **Complexity Assessment**

- Business Complexity

- Technical Complexity

- Complexity Diagram

- Suggested PM Skill Set Guidelines



- ▶ High Level Project Org.
- ▶ Project Priorities
  - Priority Analysis
  - Consequences
  - Negotiations
  - Control
- ▶ Assumptions & Risks
  - Assumptions
  - Constraints
  - Procurement Assumptions
  - Known Risks
  - Runaway Trigger
  - Shutdown Condition
- ▶ Organizational/Functional Stakeholders
- ▶ Project Charter Approvals
- ▶ Issue Log



▶ **Planning**

▶ **Project Management Plan**

▶ **Scope Management Plan**

Scope Control Process

Scope Change Request

▶ **Scope Change Request**

Description

Category

Benefits

Impact

Risk

Approval

▶ **Configuration/Change Control Management Plan**

Introduction

Participant Roles & Responsibilities

Configuration and Change Control Management Steps

Configuration/Change Control Log

▶ **Human Resources Management Plan**

Project Organization Chart

Staffing Management Plan

Required Skills & Skill Gap Plan

PASI Chart

Project Management Roles and Responsibilities



▶ Communications Management Plan

Internal Stakeholders

External Stakeholders

Recurring Meeting Planner

Project Roster

▶ Risk Management Plan

Definition of Probability and Impact Scales

Risk Register

▶ Cost Management Plan

Introduction

Participant Roles and Responsibilities

Cost Management Approach

Cost Planning

Cost Tracking

Cost Reporting and Metrics

Cost Control and Changes

Cost Closeout

▶ Quality Management Plan

Introduction

Participant Roles & Responsibilities

Quality Management Steps

Product Quality Review/Audit

Quality Action Form



- ▶ **Schedule Management Plan**
  - Activity Duration Estimate Worksheet
  - Skill Factor Table
  - Work Interruption Factor Table
  - Multi-Project Factor Table
  - Project Productivity Influencing Factors
  
- ▶ **Procurement Management Plan**
  - Acquisition
  - Protecting the State's Investment
  
- ▶ **Contract Management Plan**
  - Introduction
  - Participant Roles & Responsibilities
  - Contract and Invoice Approval Authorities
  - Contractor Performance Management
  - Contract Management
  - Closing the Contract
  
- ▶ **Organizational Change Management Plan**
  - Action Planning
  - Stakeholder Training Plan
  
- ▶ **Maintenance & Operations Transition Plan**
  - Introduction
  - Participant Roles & Responsibilities
  - Department Roles



Project Sponsor

Federal Sponsor

Contractors

Counties/Local Offices

M & O Transition Steps



▶ **Executing**

▶ Deliverable Acceptance Criteria

▶ Status Report

Progress Report – Team Member to Project Manager

Current Task Summary

Status of Assigned Issues

Status Report – Project Manager to Sponsor

Current Status Report

Look Ahead View

Status Reports – Sponsor to Steering Committee

Summary Milestones and Highlights

Monitoring Vital Signs Scorecard

▶ Sponsorship Commitment Survey

▶ Team Effectiveness Survey

▶ Benefit Validation



▶ **Closing**

▶ Formal Product Acceptance

Statement of Formal Acceptance

Additional Remarks

Accepted by:

Signed form distributed to:

▶ Project Closure Checklist

▶ Post Implementation Evaluation Report

Background and Summary of Results

Project History

Project Results

Product/System Use Review

Attainment of Objectives

Milestone Summary

Executive Summary

▶ PIER Costs – Last Approved

▶ PIER Costs – Actual

▶ PIER Costs – Comparison

▶ Final Lessons Learned

CA-PMM

SDLC

▶ **Acronyms**



## **Plan Updates / CA-PMM Workbook Updates**

Updates

## **Template Inventory**

Acronyms

Assumptions & Risks

Benefit Validation

Communication Management Plan

Complexity Assessment

Contract Management Plan

Control Management Plan

Cost Management Plan

Deliverable Acceptance Criteria

Final Lessons Learned

Formal Product Acceptance

General Information

Human Resources Management Plan

High Level Project Org.

Issue Log

Maintenance & Operation Plan

Organizational Change Management Plan

Organizational/Functional Stakeholders



Post Implementation Evaluation Report

PIER Costs – Last Approved

PIER Costs – Actual

PIER Costs – Comparison

Procurement Management Plan

Project Closure Checklist

Project Management Plan Updates

Project Priorities

Quality Management Plan

Risk Management Plan

Schedule Management Plan

Scope Change Request

Scope Management Plan

Sponsorship Commitment Survey

Status Report

Team Effectiveness (Disposition) Survey