Augusta, GA
Information Technology

<<Enter Project Name Here>>
Master Project Management Plan

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Section I: Project Management Document Guide

These questions are the foundation information for the application to be developed or implemented. Refer to the Project Management Guidelines located in the BAS Project Management document workspace for detailed information on starting a project, storage places for documents, etc.

Other documents used for project management in IT include the Business Process Analysis and Technology Plan Template. Parts of these documents can be easily copied and pasted into this document so that redundant research and documentation can be avoided.

The source column below indicates where the project features exist. "Template" indicates that the documents exist in the project templates, but please remember that these can be imported to the portal.

Identify Project Type
Determine the Project Type since that will affect which documentation needs to be used:

This project will be a: _____ Project
Mark an "X" in this project type below.

☐	Construction – Dealing with construction / renovation of buildings and major moves of equipment.
☐	Election – Technology support for the Board of Elections.
☐	Replacement Software – Replacing software that we currently use.
☐	New Software – Buying new software when none has been used before.
☐	Development – Building a new software application in-house
☐	Software Upgrade – Upgraded existing software.
☐	Minor Software Upgrade / Build Installation – Upgrade/Build with limited impact on operations
☐	Department Technology Planning
☐	Business Support

Project Management Document Matrix
Based on your answer to the Project Type question above, you will use the following documents / sections of documents to manage the project. "PM" refers to THIS DOCUMENT!

Project Type	PM - Project Definition	Construction Guide	Election Guide	PM - Vendor Selection	PM - Technical Background	PM - Implementation Guide	Project Closeout	Department Tech Planning Guide	Application Support and Maint Mgt Plan	Interface Design and Mgt Plan
Construction*		✓								
Election*			✓							
Department Technology Planning*								✓		
Replacement Software	✓			✓	✓	✓	✓		✓	✓
New Software	✓			✓	✓	✓	✓		✓	✓
Development	✓				✓	✓	✓		✓	✓
Software Upgrade	✓				✓	✓	✓		✓	✓
Minor Software Upgrade / Build	✓				✓	✓	✓		✓	
Business Support	✓				✓	✓	✓			

* If this is a Construction, Election, or Department Tech Planning Project, you don't need to use this document. You can click on the hyperlinks in the table above to open the Team Site that houses the templates for these projects.

Master Project Management Checklist

This section will be your "touchstone", "rally point", "fallback", etc. for this project. This checklist covers the project from start to finish at a very high level, meaning that it is extremely general in scope and only refers to the overall movement of the project and not the details that go into accomplishing your goals.

Project Step	Document Section	Completed ("X" when done)
Determine Project Type	1	
Create Project Portal Site	-	
Complete Project Definition	2	
Conduct thorough Business Analysis (if needed)	3	
Make Project Decision (In-House, Vendor, No Project)	2	
Initiate Vendor Selection Process	4	
Develop Bid/RFP (if needed)	4	
Initiate Bid/RFP Process	5	
Select Vendor	5	
Complete Technical Evaluation of Vendor Solution (before you sign a contract!!!)	6	
Contract Negotiation	5	
Initiate Approval Process	5	
Committee Approval	5	
Commission Approval	5	
Contract Signing	4	
Project Planning (for entire project beginning to end)	8	
Set up Budget Tracking and Order Equipment per the project plan	7	
Interface Planning (using the Interface Design and Management Plan). Identify interfaces for items identified in Project Planning	Separate Document	
Implementation	8	
Acceptance	8	
Complete Project Closeout	9	
Review Project Goals	9	
Review Successes and Opportunities for Improvement	9	
Staff Evaluations	9	
Maintenance Phase	9	
Complete Maintenance / Support Plan	9	
Complete Change Control Plan	9	
Create Application Support and Maintenance Plan	Separate Document	

Section 2: Project Definition

Customer Department Name		Date	
Department Contact		Phone	
IT Project Leader		Phone	
Tentative Project Title			
Requested Due / Implementation Date (Include Reason)			
Key Personnel Involved in Project			

Project Objective

Project Description

People

1. Who requested this project?

2. Does this project have the approval of the departmental manager(s)? Call THEM directly.

Software

1. Input Requirements

    A. Generally describe the information that will be entered into the program.

    B. What is the source of the data?

    C. Who will enter the data?

2. Departmental Relationships

    A. What other departments or agencies contribute information to this process?

    B. What other departments or agencies does this process submit data to?

3. Output Requirements (what information is needed from the program/project, such as reports, calculations, etc.)

4. Does any other software in the customer office perform this function?

5. When is a solution needed? Explain why this date is important.

Hardware

1. What hardware will be needed for this project?

2. Who is the hardware vendor?

3. Will this equipment be on the Augusta City Network?

Budget

1. Does the department have funding for this project?

Project Goals
Define these prior to the beginning of the project. When the project is complete, evaluate the results in the table at the end of this document.

	Goal	Criteria for Success	Success?
1	Finish Project On-Time	Finish the Project According to the time-line established at when the vendor is contracted (NOT when we establish a potential goal during annual pre-planning).	Will be evaluated at end of project.
2	Finish Project within Budget	Complete the Project within the parameters established when the contract was signed with the vendor. This amount MUST be within the budgeted amount specified for the project during the budgeting process.	Will be evaluated at end of project.
Customer Department Business Goals			
3			Will be evaluated at end of project.
4			Will be evaluated at end of project.
5			Will be evaluated at end of project.

Pre-Project Technical Evaluation
Proceed to the section below entitled "Project Technical Evaluation" and fill out the sections for existing equipment. This will guide you on the technical environment that is needed to achieve the objectives of this project. In short, you will be gathering information that helps us answer the question, "Where are we now?" and "What assets do we have at our disposal?""

Proposed Solution(s)
Instructions: Describe the various solutions that are possible for this project after you gather the information above and analyze it.

Costs and Risks
Instructions: Review the costs of this project. Include Excel spreadsheets (you may reference them as attachments if you like) that summarize the costs of various solutions that you are proposing above.

Project Cost / Budget
Instructions: Record or Link to a spreadsheet that has preliminary information about the cost of this project. For example, if the user wants to buy several PCs to facilitate this project, then you need to keep track of that in order to keep them abreast of the status of the items.

Item	Units	Unit Cost	Extended Cost	Status
Total				

Planning Questions

Question	Answer

Tentative Project Plan

Task	Resource	Status/Comments	Start Date	Planned End	End Date

Project Time Estimation

Project Timeline Constraints

- Assume that ½ of your time will be taken up with support issues for existing end users and their problems or administrative tasks.
- This means that 1 month of project work = 2 months on the calendar for any particular project.

Assessment Projects/Phases

Project Component	Definition / Conditions	Max Time Estimate	My Project
Project Discovery		0 days	
Project Definition	Likely Small Project (additional module, small department, minimal processes) 1 week of time	1 week	
Project Definition	Likely Major Project (new department-wide software or replacement of existing department-wide software) which includes business process analysis	2 months	
Project Recommendation	Preparation of Recommendation and Presentation to decision-makers	2 weeks	
Total Project Time Estimate			

Vendor Selection and Approval Projects/Phases

Project Component	Definition / Conditions	Max Time Estimate	My Project
RFP Development		2 months	
RFP Release and Closing	< $100,000 projects	1 month	
RFP Release and Closing	> $100,000 + projects	2 months	
Vendor Choice	IT-only (no end-user involvement)	2 weeks	

	For bid projects	1 month	
	For RFP projects involving end user selection committee	2 months	
Contract Negotiation	1 month for bid/small agreement projects	1 month	
	3 months for major contracts	3 months	
Attorney Review		1 month	
Commission Approval		1 month	
Total Project Time Estimate			

Upgrade Projects

The intensity of upgrade projects are usually dependent upon the individual vendors. Some are very easy and are vendor-managed, and sometimes we are left on our own. Your development of a timeline for upgrades will be determined by historical upgrade experiences for our various applications and their respective vendors. If an upgrade will require a lengthy contract negotiation process, on-site training from the vendor, new servers, etc. then you should treat the project as an Implementation instead of an upgrade. These may run concurrently.

Project Component	Definition / Conditions	Max Time Estimate	My Project
Obtain Quote / Contract from Vendor	Sometime upgrades will not be covered under maintenance and will require a quote or contract	1 month	
Negotiate Contract / Agreement		1 month	
Obtain Upgrade Documentation from Vendor and Plan Upgrade		1 month	
Equipment Required	Add this time if we have to spec, quote, order, and install hardware	2 months	
Acceptance Period		1 month	
Total Project Time Estimate			

Implementation Projects/Phases

Typically, the project steps and time allotments will be confirmed with the vendor during contract negotiation. If, for some reason, we do not have this information or it does not apply, use the guidelines below. These have been scaled down to compensate for some of the tasks running concurrently.

Project Component	Definition / Conditions	Max Time Estimate	My Project
Implementation Base Project	Generic time to account for implementation planning, setup, etc.	3 months	
Equipment Required	Add this time if we have to spec, quote, order, and install hardware	2 months	
Conversion Required	Add this is we need to perform a conversion	1 month	
Train-the-Trainer	Add this if training is required for certain users who will train others	1 week	
End User Training	Add this if training is required for end users and IT's lab will need to be used	3 weeks	
Testing	Add this if significant testing will need to be done by IT and end user	2 months	
Acceptance Period	Go-Live + 30 days	1 month	
Total Project Time Estimate			

Project Decision

Instructions: Record an "X" in the table below for the choice, then use narrative to describe the reasoning behind this decision. Once you have completed this section, review the text below under "Next Step" to determine your course of action.

Project Decision

	Proceed with this project by seeking out and implementing or upgrading vendor software
	Proceed with this project by working with the IT Development Group to create custom software

☐ Do not proceed with this project

Explain Project Decision if NOT proceeding
Insert text here about the project decision IF we are NOT moving forward. This is what you will need to report to the department head of the customer department.

Obtain Department Head Approval
If we are moving forward with the project, then get written approval from the department head (via email is OK) and paste below.

Next Step
Instructions: If the project will NOT move forward, then delete the remainder of this document and save the completed part on the portal under the Departments > Shared Documents > Department Name Projects folder.

If the project will move forward, then the following steps should take place.

1. Create this project in the Track-IT! project list if you have not already done so.
2. Add the tasks/milestones above as tasks in Track-IT! and assign to the appropriate IT personnel.
3. Create this project in the portal if you have not already done so.
4. Choose a method of managing this project electronically depending on how big the project will be:
    A. If this is a budgeted project that will require coordination with vendors, a formal selection process, commission approval, etc. then it will be to your advantage to use the transfer the information compiled so far into the appropriate places later in the document where applicable.
    B. If this is a no-budget or low-resource-demand project, you can build on this document instead of creating anything else. For example, you can use the "Tentative Project Plan" above as the actual project plan. It is recommended that you save this document and then clean up a new one to be your working project document. If this is the case, delete everything that follows this page.
5. If you chose 4A above, then your use of this document is concluded. Keep it for reference.
6. If you chose 4B above, then delete these instructions and get to work!

Section 3: Business Analysis

IT Business Process Analysis Tasks

The department has requested that IT investigate a solution to a business problem. The next step is to evaluate the department's issues and determine how IT can best solve the business problem.

Step	Project Development Action	Status	Scheduled Completion	Actual Completion
Analysis Tasks				
Department works with Project Leader to develop a Project Definition Document.				
Kickoff meeting with user (discuss parameters of project)				
Business Process and Analysis				
Fundamental Technology Evaluation				
Collect data related to Workflow discovery process				
Collect data related to job tasks				
Complete System Requirements				
Evaluate Process				
Complete Project Analysis Questions after evaluation				
Evaluate the various aspects of the different options by using the Solution Comparison Matrix.				
Submit Project Recommendations to Assistant Director				
Submit recommendations to IT Director				
Project Choice				
Make recommendation to department (select one)	Vendor	In-House	No Project
Link to next project document	<insert link here>		
If No Project, send letter to department stating reasons why (with approval of IT Director).				

Fundamental Technology Evaluation

Conduct a general Technology Analysis according to the following tables. This analysis will determine where the organization stands today in many areas where technology is a factor.

Email / Outlook	Answer
Does everyone at the department have email? If not, why not?	
Is email used for official department communications? Always, sometimes, never?	
Is everyone aware of how to organize meetings using the Calendar?	
Is the department using Outlook for their sick and vacation time?	
Is the department using network or local storage for their email?	

Common Drive(s)	Answer
Does the department have a common drive that everyone is aware of?	
Is the department using a common drive to store their important information, or is data stored on local computers (and therefore not backed up)?	
Are users aware of how to use "My Documents" so that their files are not stored in multiple places on the hard drive?	
Are users aware that they have Personal Drives (M:\) to use for backup.	

Organizational Structure	Answer
Who is the department head?	
Is there a hierarchy that the department head falls under (like the court system, etc.)?	
Are there multiple divisions of the department? How many people are in each?	
Please attach an organization chart if one is available.	

Jobs	Division (if Applicable)	Technology Needs
What are the job descriptions in this department and what technology devices and software does each job need?		

Location (answer questions for each facility – add as needed)	Purpose of this Location	Employees at Location	Fiber-Optic at this site?

Security	Answer
Is the department implementing security practices such as logging out or locking the screen when they step away from the computer?	
Is the working area accessible to the public? If doors are unlocked during business answers, the answer is "Yes".	
Are there any security measures in place for the facility?	

Software	Answer
What software packages are used for the business processes of this department?	

Workflow Discovery

Instructions: This step involves the study of the major processes in the office on a "macro" level, meaning that the intricate details are not necessary – this is an overall picture of how the work flows. See the Appendix for explicit instructions for this process and for ideas about the information to capture.

The table below is a sample for your convenience. It is not necessary – you can just as easily use another format that applies to the situation. If you want to, you can copy and paste the table below as necessary to capture all the workflows. You may use Visio to create these process flows as well.

Workflow Item	Process Steps	Who Performs Task?

Job/Task Form

Instructions: This step involves the analysis of individual staff members and the tasks that they perform in the execution of their jobs. Most of these activities should fall into the major workflow processes described above. For example, if you record a process step above, that step may actually be a task that is broken out in the form below. Copy and paste the table below as necessary to capture all the tasks.

Task Name	
When / How often is this done?	
Source (where does the work come from)?	
Step-By-Step Detailed Procedure needed to satisfy this task	
Output	
Time required to Complete this task	
Evaluation / Suggestions	

Workflow/Process Evaluation

Instructions: For each of the workflows posted above, you will need to refer to the questions below in order to interpret the information that you have gathered. The idea behind this is to determine areas where technology can be applied to help the department solve business problems. This should also help to look at the department holistically and determine if problems are systemic or isolated to specific work functions.

Existing Process Discovery

Answer the following questions for each major business process and prepare a Visio chart if applicable. A "major" process is defined here as a key part of the department's business, such as "Booking Arrested Persons", or "Handling Tax Assessment Appeals", or "Processing Applications". The information gathering and subsequent evaluation of each process would need to take place for EACH process.

1. What is the Business Process?
2. How does this process help the department succeed in its mission?
3. Process Ownership:
   A. Who is the "owner" of this process (whose responsibility is it to see that the process is completed)?
   B. Who is the process owner's manager (and so on until we get to the department head)?
4. Workflow (diagram these where applicable)
   A. What is the basic element of work (cases processed, applications entered, inspections performed, etc)?
   B. Where does the work originate (how do we know that there is work to do)?
   C. How does work flow through the system for each element type (what are all the steps that have to be accomplished in order to consider a job "complete"?)
      1). What data entry into the system (if automated) takes place at each step?
      2). What documents are scanned at each step?
      3). What extra information is needed from other people to fulfill the task?
   D. How many people are assigned to each element type (or how else is work assigned to people) in the department?
   E. What percentage of worker's time is absorbed by this process (as a % of each day)?
   F. Is there a performance measure applied to this process at all?
5. Technology (feel free to integrate these answers into the workflow discussion above).
   A. What technology tools do the assigned staff members have access to now (PC, scanners, printers, etc)?
   B. Is this process already automated using a computer software/hardware system of some kind?
   C. Is paper a part of this process at any point? Where?
6. Associated Processes
   A. Does this process affect other departments? How is information communicated to the other departments?
   B. Is there a part of this process that IT is actually performing that the users could do for themselves?

Process Evaluation

Examine the answers to the questions derived in the "Existing Processes" section and answer the questions that follow.

1. Do the processes appear to be efficient (*efficient* is defined here as "acting or producing results with a minimum of waste, expense, or duplicated or unnecessary effort.)?
2. Do the processes appear to be effective (*effective* is defined here as "producing the desired / planned results" or "does the process get the job done".)
3. Could document imaging (EDMS) be implemented to complement/replace any of their business processes?
4. Could a workflow management product (GBA or something like it) be used to facilitate better process management?
5. Is the existing system being fully utilized by the department?
6. Is a new system needed to replace an existing system that is inefficient?
7. Identify opportunities to save $$$$!

<u>Extra-Process Issues</u>

Instructions: There may be issues that are not related to the business process that cause conflict and inhibit the implementation of technology in a department. There may be staff qualification issues, leadership issues, working condition problems, political considerations, or morale problems that adversely affect a staff's ability to work together as a team. These cases are more delicate and most cannot be corrected by tweaking a business process. These issues MUST be identified as part of this analysis in order for the recommendations to be effective, but diplomacy will always be employed in order to ensure that we don't deliberately hurt feelings. With that said, even if something is unpleasant to discuss, it should still be brought out so that the problem can be addressed. Issues to address here are:

1. Staff Quality
   A. Is the staff trained and able to perform their jobs?
   B. Are there usually vacancies at the department?
   C. Does this office have a lot of turnover? Why?
2. Leadership / Management
   A. Is there effective management in the department?
   B. Is the organization structured properly for this activity?
3. Working Conditions: Are the employees safe and secure? Is this a dangerous place to work?
4. Morale: Is this a happy place to work? Is it a miserable place to work? Why?
5. Legal Issues: Are there legal requirements that force certain functions to be done a certain way? If you are told, "the law says that we have to do this", ALWAYS ask for more information and find out which law is being blamed for the situation.

System Requirements / RFP Building

A critical part of the analysis of a department's processes involves developing system requirements. System Requirements will become part of an RFP. The system requirements are really the output generated by the steps that have been taken previously, since they will cover, in depth, how to solve all of the business problems that have been identified. System Requirements cannot be developed without a clear understanding of the user's wants and/or needs. By the time this document is complete, there should be a complete understanding between IT and the user regarding what the user needs. Requirements will likely change in the middle of a large project, but more work up-front will result in less re-work later on.

Section 4 of this document is dedicated to the capture of system requirements.

Potential Project Evaluation

Instructions: Fill out the form below in order to evaluate the department's request and compare it to your finding where the workflow and job tasks were concerned. Add any questions and comments that you believe are needed. Please expand your answers to additional pages outside of the table if necessary – do not let the restriction of the table inhibit your need to be verbose to answer the questions accurately.

Question	Answer
Management	
What is the overriding goal of this project?	
Have the REAL decision-makers in the department approved of the concept of the project?	
What will be the consequences of not pursuing this project?	
Are there any state / local ordinances that will affect this project long-term (will we have to rewrite it each year because laws have changed)?	

What are the things that could go wrong and how will we deal with them? Use at much space as you need to: Halfway to project completion is no time to say "Oops, we didn't think of that!"	
Performance Measurement	
What will be the key indicators of SUCCESS for this project?	
How will we know if individual users have improved performance after we implement?	
Information Technology Issues	
Is it within the capabilities of the IT Department to solve the business problem(s) discovered in the Business Process Analysis (either in-house or through a vendor)? Explain.	
What software or hardware technologies were explored that can solve this problem?	
Is any other software affected by this issue (interfaces, etc).	
Are there any other IT or department projects pending that will affect / be affected by this project.	
Funding and Budget	
What is the current cost of the department's solution for this problem (if they have one)?	
Does the department have funds for this project?	

Solution Comparison Matrix

Instructions: Fill out the table below in order to compare the various options for the completion of the project. If you need more, please add columns or copy to another page – this is the time to consider the ramifications of one option vs. another. When calculations need to be performed, please enter the information into MS Excel and post the results here. The default options below are "Vendor", "In-House", and "No Project", but these can be adapted for multiple vendors or multiple in-house options as needed.

Item	Vendor	In-House	No Project
Potential time to delivery (if started today)			
Legal considerations			
Risk of Failure for this solution. If we choose this option and it fails, what happens?			
Cost of this solution. Extrapolate over several years if necessary to show long-term operating costs. Develop multiple scenarios if necessary.			
What is the Return on			

Investment (ROI) from this solution. See instructions in the next section.			
Pros for this Solution			
Cons for this Solution			

Return on Investment (ROI)

The ROI of a project is a performance measure used to evaluate the benefit of an investment or to compare the benefits of a number of different options. To calculate ROI, the benefit (return) of an investment is divided by the cost of the investment; the result is expressed as a percentage or a ratio. The return on investment formula is as follows:

$$ROI = \frac{(\text{Gain from Investment} - \text{Cost of Investment})}{\text{Cost of Investment}}$$

ROI is a very popular metric because of its versatility and simplicity. To summarize, if an investment does not have a positive ROI, or if there are other opportunities with a greater ROI, then the investment should be not be implemented unless there are sufficient benefits to our customers (citizens) to justify it, or if it is the "lesser of two evils" for something that is mandated for the government to do.

Project Recommendation
Go back to the Project Decision subheading in Section 2 and make your recommendation for how IT should proceed with this project.

Section 4: Statement of Work and System Requirements

Statement of Work

Develop a statement of work for this project. The scope of work is what we will need to tell the vendor to do as part of the project, and it will be included in the RFP or bid that we send out. If we are not going to do an RFP then delete the statement of work. A sample scope of work is provided below.

Vendor shall furnish all necessary personnel, materials, equipment and related services as necessary to research, design, fabricate, test, deliver, install and make operative software that will <insert function here>.

Vendor shall furnish training to Augusta so that all personnel who will be using the software and/or hardware technology will be familiar with its operation. Likewise, Vendor shall provide training to office and/or administrative staff members as needed so that they can provide assistance with the software and hardware as well as derive use from data generated from the use of the technology.

Vendor will provide ongoing maintenance and support for the software and the hardware acquired as part of this project. If any software or hardware is to be obtained from a 3rd party, then Vendor shall be exempt from repair or replacement of said equipment except where specifically identified in this contract between Augusta and Vendor.

System Requirements

System Requirements are mandatory prior at the beginning of any development or implementation project (except when we are upgrading and our current functionality will NOT be impacted by the upgrade). The System Requirements Template is located on the IT Portal in the Information Technology > Shared Documents area. Copy and paste that document to your project team site and add lines as necessary. These are MS Word tables so you can add lines by clicking to the right of the row (just barely outside of the table) and then pressing enter.

The first table in the list is composed of the IT-Required items for major software implementations. The second table is composed of those items related to satisfying the department's specific business requirements. These should be developed in conjunction with the user department and should be detailed, but not so strict that no vendors will send in proposals. This is art, not science…

You may develop your system requirements here, or you may link to a separate document if they are detailed and > 10 pages.

Insert a hyperlink to your specific system requirements document here: <hyperlink>

Section 5: Procurement Process and Project Approval

Vendor Software Selection and Implementation Tasks

For the following items, please mark the Status:
- *COMPLETE – The task is completed*
- *IN PROGRESS – The task is currently being worked on*
- *WAITING – The task is being held up by the user, technical issues, etc. Explain!*
- *ON-HOLD – The entire project has been delayed by circumstances beyond the developer's control.   Explain!*

Action	Status	Scheduled Start	Scheduled Completion	Actual Completion
Project Setup				
Conduct Familiarization Demonstrations.				
Develop detailed System Requirements for the software based on Business Process Analysis. Click Here to see notes on the System Requirements.				
Project Cost Estimate				
Prepare Project Budget Spreadsheet on project team site.				
Develop "ballpark" amounts for hardware and software needed for this project and enter on the Pre-Project Budget spreadsheet.				
Enter ATOMS Order numbers for the items that you requested budget estimates for				
Update / Change Budget as necessary				
Determine Acquisition Method The approximate cost of the software will dictate how we can proceed with Procurement (choose one of the following):				
If the cost is estimated to be less than < $500 then you can get three oral quotes.				
> $500 and < $10,000, then you need to get three written quotes from three different vendors – proceed to section entitled "Bid Process".				
>= $10,000, then you must release a Request for Proposals (RFP) – proceed to section entitled "RFP Process".				
Sole Source (you must choose this specific vendor for a very specific reason and have the Procurement process approve)				
Bid Process (skip or delete if RFP was used)				
Obtain three quotes for software (if less than $10,000)				
See demos as necessary				
Choose Vendor				
Formal Approval	Go to "Approval Process" below			

Action	Status	Scheduled Start	Scheduled Completion	Actual Completion
RFP Process (skip or delete if bids will be used)				
Write Request for Proposals (RFP).				
Provide RFP to Procurement				
RFP Closing Date Set (by Procurement)				
Rate proposals and determine top three vendors				
Invite top three vendors for demos				
Rate demos and choose vendor				
IT Director advise Purchasing in writing of department decision				
Purchasing should notify losing vendors of the decision.				
Formal Approval	Go to "Approval Process" below			
Sole Source Process (delete if bids or RFP will be used)				
Document reason why this should be a sole source				
Prepare Sole Source Justification form for Procurement Department				
Obtain Procurement Director signature on Sole Source Justification Form				
Formal Approval	Go to "Approval Process" below			
Approval Process				
Negotiate Contracts with vendor				
Software Contract Completed				
Maintenance Contract Completed				
Vendor Acquired Performance Bond				
City Attorney / Law Department Approval of Contracts				
IF < $20,000, take to Administrator for signature (with memo describing what we're doing)				
IF > $20,000, submit Agenda Item to Commission via MuniAgenda. Include budget breakdown, sole source / bid forms, etc.				
Committee Approval (if > $20,000)	Insert date on which item is to be discussed.			
Commission Approval (if > $20,000)	Insert date on which item is to be discussed.			
Receive Commission / Administrator Approval Letter and scan into EDMS				
Take contract(s) to Clerk of Commission (with approval letter) so that Mayor can sign contracts				
Communicate to Vendor that we have contracts and send to them for their signatures				
Receive contracts back from vendor, confirm all signatures, and scan into EDMS				
Send contracts to Clerk of Commission for their official records				
Proceed to Section 6 and begin project implementation	Proceed to Section 6			

Vendor Selection Information

Instructions: Ask the following questions of vendors while you are doing product research in order to see how the vendor(s) conform to our technical environment and how their software best fit the user's needs.

Questions for Vendor(s)

Question	Vendor 1 Response	Vendor 2 Response	Vendor 3 Response
What is your philosophy toward project management and/or how do you handle implementations?			
Equipment Requirements			
What are your server requirements?			
What are your client computer requirements?			
What databases does your software work with? How many customers do you have on each?			
Software Operation and Environment			
Is your software client-server based or is it browser-based?			
Do you know what a DMZ is and do you have experience with your data residing in one?			
Deployment – do you have a deployment "push" or is it up to us to install the client at every user location?			
Does your software require administrative rights to a PC in order for users to use it?			
Are there any third-party software supplemental packages needed to implement your software?			
Are there any additional hardware items required to maximize the use of your software?			
Maintenance and Support			
What are your help desk hours?			
Trouble calls turnaround time?			
Upgrades: Are they free or do we have to re-buy the software?			
What issues are covered under the maintenance agreement and what issues would we have to pay extra for?			
Can I get a soft copy of your contract so that we can start contract negotiations ASAP IF you are the selected vendor?			
Will you need remote connectivity to the database / server through our firewall? We require an agreement from you before we can proceed with this.			
Other			
Do you have any mobile applications?			
Do you have a user group or annual conference?			
Do you have an integrated document imaging solution?			
Do you have a standard report writer?			
Who is your largest customer and how many licenses or your product do they have?			

Section 6: Project Technical Evaluation

New Vendor Software

Question	Vendor Response
What is the name of the selected software	
What is the version that we will be implementing	
How long has this version been released?	
Equipment Requirements	
How many servers will we need to implement this application?	
What are your server requirements?	
What are your client computer requirements?	
What databases does your software work with? How many customers do you have on each?	
Do you have any experience working in a virtual environment? Using what software?	
Software Operation and Environment	
Is your software client-server based or is it browser-based?	
Do you know what a DMZ is and do you have experience with your data residing in one?	
Deployment – do you have a deployment "push" or is it up to us to install the client at every user location?	
Does your software require administrative rights to a PC in order for users to use it?	
Are there any third-party software supplemental packages needed to implement your software?	
Are there any additional hardware items required to maximize the use of your software?	
Licensing Requirements	
How many licenses of each module will we need to purchase?	
Maintenance and Support	
What are your help desk hours?	
Trouble calls turnaround time?	
Upgrades: Are they free or do we have to re-buy the software?	
What issues are covered under the maintenance agreement and what issues would we have to pay extra for?	
Can I get a soft copy of your contract so that we can start contract negotiations ASAP IF you are the selected vendor?	
Will you need remote connectivity to the database / server through our firewall? We require an agreement from you before we can proceed with this.	

New In-House Software

Question	In-House Development Team Response
Equipment Requirements	

What servers will we need to implement this application? • Web/IIS? • Application? • Database? • DMZ?	
What are the server requirements? Say "Default" if this application is suitable for inclusion on a small application server.	
What are the client computer requirements? Indicate "Standard" if a standard county PC will suffice	
What databases do we intend to work with?	
Is this suitable for use in a virtual environment?	
Software Operation and Environment	
Is your software client-server based or is it browser-based?	
Is there a requirement for any of the data to be housed in a DMZ?	
Deployment – do you have a deployment "push" or is it up to us to install the client at every user location?	
Does your software require administrative rights to a PC in order for users to use it?	
Are there any third-party software supplemental packages needed to implement your software?	
Are there any additional hardware items required to maximize the use of your software?	
Licensing Requirements	
How many licenses of various products will we need to purchase?	
Maintenance and Support	
Customer Department IT Group (NOT the Development Group unless this is a project for IT)	
Active Directory	
Indicate if Active Directory Groups will need to be created to support this application.	

Existing Software Versions and Users

Business Software

If this is a replacement or upgrade project, then fill out this table for the <u>software that is being replaced or upgraded</u>. Copy and paste this table as needed for all of the business software used by this department which is being updated or replaced.

Issue	Status and Comments
Software Name	
What is the current version of the Software?	
What is the proposed version of the software (if upgrading)?	
What user groups (NT/Active Directory) use this software?	
Number of users?	
What server(s) are used to house this application, databases, etc. (include an entry for each below in the Servers section)	
How do the users access this software (mapped drive, web browser, ODBC, etc)	
Is the software web-based? If yes, answer the following questions.	
Is a server available that has IIS installed for use or will this require a new server?	
Is the software hosted locally or are components hosted by the vendor?	

Interfaces

Other Software: Is there other existing software impacted by this implementation? Does other software need to be ugdated/upgraded, or will an interface require rework? For each of these interfaces, please create an Interface Design and Management Plan so that we can plan how the software will be connected with the other software packages that it needs to exchange or distribute information to. Evaluate this for in-house AND vendor-developed systems.

Software	Description of Relationship and Plan for Resolution

Existing Servers

Server Upgrade Needs

Issue	Status and Comments
Do we already have server(s) running this solution / do we plan to try to use an existing server? If YES, then identify them in the tables below. Also indicate their characteristics. If NO, then identify the characteristics and create an ATOMS task for ordering servers.	

Server Characteristics

Copy and paste this table as needed for each of the servers needed for this project. If we are NOT compliant, then we will probably need a server. This will help build the requirements list for new servers. Delete this section if we are implementing an in-house solution and no new servers are needed.

Server 1 Name			
Server 1 Characteristics	**Our Server**	**Vendor Requirement**	**Are We Compliant?**
Model			
Operating System (include Service Pack)			
Number of Processors			
Processor Speed			
RAM			
Hard Disk Space Total / Currently Used			
Database			
Network			
Form Factor Type			

Server 2 Name			
Server 2 Characteristics	**Our Server**	**Vendor Requirement**	**Are We Compliant?**
Model			
Operating System (include Service Pack)			
Number of Processors			
Processor Speed			
RAM			
Hard Disk Space Total / Currently Used			
Database			
Network			
Form Factor Type			

Database Issues

Existing Database

Record this for our existing data, even if we intend to replace the software that uses this database. The reason for this is that we want to determine where the data is that we intend to move to the new system.

Database Characteristics	Description
Database Name	
Database Location (server name(s))	
Database Type (Oracle, SQL, etc.) Indicate version.	
Proposed Program Location (indicate **server** (+ location) or **client**)	
Number of Licenses Available	

Proposed Database

Record this for vendor systems AND in-house systems.

Database Characteristics	Description
Database Name	
Database Location (server name(s))	
Database Type (Oracle, SQL, etc.) Indicate version.	
Proposed Program Location (indicate **server** (+ location) or **client**)	
Number of Licenses Available	

Client Systems

Evaluate the current clients that are expected to run this software. Record their characteristics below and note if they meet the vendor's requirements.

Issue	Status and Comments		
Number of Client PCs involved			
Characteristics	**Our Client Systems**	**Vendor Requirement**	**Are we Compliant?**
Operating System (include Service Pack)			
Number of Processors			
Processor Speed			
RAM			
Hard Disk Space Total / Currently Used			
Database Connection			
Client Action Items (put in ATOMS Order as needed)			
Client Systems to Order			
Client Systems to Upgrade			

Peripheral Equipment

Indicate if any special peripheral equipment is needed for this project.

Issue	Status and Comments		
Will software require special equipment to run and perform all functions of the department? Example: receipt printers, cash drawers, bar-code readers, etc.			
Will printers be required to be able to print from non-Windows platforms (Unix, AS400, etc.) This may require special printers or drivers.			
Equipment	**Vendor Requirement**	**Are we Compliant?**	**# to Order**
Non-Windows Printers			
Receipt Printers			
Cash Drawers			
Touch Screen Monitors			
Plotters / Large-format printers			
Scanners			

Network Connectivity

Issue	Status and Comments	
What level of connectivity does the vendor's software require? (Fiber, Broadband, DSL, etc). If we are not compliant, then create a task for getting a connectivity quote.		
Customer Locations	**Minimum Connectivity Requirement**	**Are we Compliant?**

Network Security and Configuration
Delete this table and indicate "N/A" if you are building an in-house application.

Issue	Status and Comments
Do you use Microsoft Active Directory (or other LDAP) for security authentication on your network?	
Do you use Microsoft Exchange as your email server solution?	
Do you use Microsoft Exchange for users' calendars?	
Do you use Microsoft Group Policy to distribute software updates to your user workstations?	

Deployment

Issue	Status and Comments
Is vendor scheduled to be onsite during installation?	
What software needs to be installed on the servers prior to training?	

What software needs to be installed on the local PC prior to training?	
What software needs to be installed on the servers prior to implementation?	
What software needs to be installed on the local PC prior to implementation?	
Have we obtained all the necessary CD's, etc. from the vendors?	
Can we deploy the upgrade using Wise Installer or some other kind of installation package or push technology?	
Does IT or the vendor deploy hardware pieces (if any)?	
Will vendor require access to Augusta servers via a remote connection (VPN). If so, then see the next section on Vendor Remote Access.	

Vendor Remote Access

Delete this table and indicate "N/A" if you are building an in-house application.

Issue	Status and Comments
What server(s) will vendors require access to?	
What software will the vendor use to connect to the server (VNC, WebEx, etc). VNC is current standard.	
Has connectivity software been installed on the server(s)?	
Has the vendor signed a VPN Request form?	
Has the VPN account been set up for the vendor?	
What is the vendor's login and password to their VPN account?	
Has the vendor successfully logged into the account?	

Project Leader Instructions

1. Evaluate each of the items above and determine what equipment we need to order or what tasks we need to accomplish in order to move this project forward.
2. Create ATOMS Orders or ATOMS Project Tasks for each and assign accordingly.
3. Review repeatedly as new information comes forward.

Section 7: Budget and Acquisitions Management

If there is no budget for this project (and no cost that IT will be responsible for managing, such as new hardware or software, etc), then you can delete the tables below and indicate that "There is no cost for this project" under the heading.

Budget Tracking Guide

Project Development Action	Status	Scheduled Start	Scheduled Completion	Actual Completion
Project Cost Estimate				
Prepare Project Cost / Budget Spreadsheet				
Create ATOMS Order(s) for hardware items to be purchased as part of this project. Record the ATOMS orders in the table below.				
Update / Change Budget as necessary				

Equipment Order List

This table is where you compile all of the orders that you expect to create as part of this project. Fill this in as you determine the technical requirements for the project so that you have a running summary of what we want to order. Once this list is complete, you would use this table as a guide to enter your ATOMS order.

Item to Order	Number to Order	Location(s)	ATOMS Order #	Status

Section 8: Implementation Tasks

Use the tasks on the following pages to guide the implementation of the technology solution.

Implementation Tasks (Minor Upgrade / Build Installation)

Instructions: This details the steps that are taken to manage a minor vendor software upgrade or build installation. This applies to implementations that entail no conversion, very little cost (if any), minimal training, etc,. but do require coordination on the part of IT, vendor staff, and the end users. Delete this section if you are implementing new software.

Project Development Action	Status	Scheduled Start	Scheduled Completion	Actual Completion
Planning & Preparation				
Determine need for upgrade				
Evaluate vendor software needs of upgrade				
Evaluate 3rd-Party hardware / software / tools needed for the upgrade				
Evaluate technical needs of upgrade				
Evaluate database needs of upgrade				
Confirm with IT Security Administrator that vendor has VPN access (if needed)				
Evaluate user-based constraints (do they need time to do billing, month-end reports, etc.) that might conflict with an upgrade?				
Determine technical / networks / desktop resources (personnel) that will need to be available to assist with this upgrade				
Meet with users to review cost of upgrade and the potential schedule that we will need to follow (see tasks below)				
Email everyone involved a project calendar and confirm that they will be present				
If there is a cost, create Purchase Order (PO) for the vendor amount for this project • IF project is using IT funds, get IT Admin Asst to create a PO • If end user department will be paying, THEY should create the PO				
Acquisition & Install of Hardware and Software (these should also be found in budget sheets)				
Create ATOMS Orders for all hardware to be ordered				
Implement process to get software ordered				
All hardware ordered				
All software ordered				
All hardware installed				
All software installed				
HW and SW Acquisition Complete				
Go-Live Preparation				
<Insert any software-specific tasks here>				

Project Development Action	Status	Scheduled Start	Scheduled Completion	Actual Completion
Live Date				
Project Acceptance				
Confirm software is working according to user specifications				
Fully Implemented				
Maintenance and Support				
Prepare Maintenance and Support Plan				
Notify User in Writing of Maintenance and Support Plan				
Add the cost of this maintenance to our annual Operating Budget.				
Update Software Installation Instructions in Track-It				
Update Software in DML				
Implement Maintenance and Support Plan				
Post-Project Evaluation				
Complete Post-Project Evaluation				

Implementation Tasks (Vendor Software Implementation)

For the following items, please mark the Status:
- *COMPLETE – The task is completed*
- *IN PROGRESS – The task is currently being worked on*
- *WAITING – The task is being held up by the user, technical issues, etc. Explain!*
- *ON-HOLD – The entire project has been delayed by circumstances beyond the developer's control. Explain!*

Project Development Action	Status	Scheduled Start	Scheduled Completion	Actual Completion
Budget Administration				
Create Purchase Order (PO) for the vendor amount for this project • IF project is using IT funds, get IT Admin Asst to create a PO • If end user department will be paying, THEY should create the PO • Use commission approval letter as proof for IT Admin Asst				
Project Kickoff				
Kickoff Meeting				
Setup Tasks				
Add project team members (vendor and Augusta) to portal site for this project				
Create Track-It tickets for key project dates and internal tasks and assign accordingly				
Set up vendor VPN access with IT Security Administrator (if needed)				
Confirm operating VPN access for vendor				
Project Planning Tasks				
Conversion				
Acquire Data Dictionary from vendor				
Acquire Schema / ERD from vendor				
Prepare Conversion Plan				
Execute Preliminary Conversion				
Test Conversion (repeat as necessary)				
Final Conversion prior to go-live				
Acquisition & Install of Hardware and Software (these should also be found in budget sheets)				
Create ATOMS Orders for all hardware to be ordered				
Implement process to get software ordered				
All hardware ordered				
All software ordered				

Project Development Action	Status	Scheduled Start	Scheduled Completion	Actual Completion
All hardware installed				
All software installed				
HW and SW Acquisition Complete				
Link to Project Cost / Budget Spreadsheet				
Quality Assurance Testing				
Prepare Quality Assurance Test Plan				
Implement Test Plan				
Testing Complete				
Ready for Live				
Quality Issues recorded in Implementation Log				
Training				
Prepare Training Plan				
Vendor User Manual Received				
Implement Training Plan				
Training Complete				
Additional Project Tasks (fill in as needed)				
Go-Live Preparation				
Conversion Complete				
Hardware Installed				
Software Installed				
Live Date				
Project Acceptance				
Satisfaction of all System Requirements				
30 Days since implementation				
All errors corrected				
Fully Implemented				
Completion of Final System Acceptance Form				
Maintenance and Support				
Prepare Maintenance and Support Plan				
Notify User in Writing of Maintenance and Support Plan				

Project Development Action	Status	Scheduled Start	Scheduled Completion	Actual Completion
Add the cost of this maintenance to our annual Operating Budget.				
Prepare Change Control Plan				
Update Software Installation Instructions in Track-It (via ticket to Help Desk)				
Update Software in DML (via ticket to Help Desk)				
Update Common Knowledge Base Wiki to include reference to this new application				
Implement Maintenance and Support Plan				
Post-Project Evaluation				
Complete Post-Project Evaluation				

Implementation Tasks (In-House Software Development)

Instructions: This details the steps that are taken to prepare a development project from start to finish. Delete this section if you are acquiring vendor software.

For the following tables, please mark the Status:
- *COMPLETE – The task is completed*
- *IN PROGRESS – The task is currently being worked on*
- *WAITING – The task is being held up by the user, technical issues, etc. Explain!*
- *ON-HOLD – The entire project has been delayed by circumstances beyond the developer's control.   Explain!*

Project Development Action	Status	Scheduled Start	Scheduled Completion	Actual Completion
Project Kickoff				
Kickoff Meeting				
Analysis				
Meet with user(s) to gather detailed System Requirements. PL and/or Developer(s) should assist with this process.				
Complete system requirements based on interviews / shadowing / other input from users.				
Initial Meeting with System Administrator on Licenses				
Completion of System Requirements Signature Form				
Project Cost				
Prepare Project Cost / Budget Spreadsheet				
Include projected manhours for project key personnel in Budget spreadsheet.				
Create ATOMS Order for hardware and software items to be purchased as part of this project				
Enter ATOMS Order Number	<insert ATOMS Number(s) here>			
Update / Change Budget as necessary				
Design				
Completion of Data Dictionary				
Completion of Schema				
Completion of diagrams, mock-ups, prototypes as necessary.				
Meetings with System Administrator to review data dictionary and schema				
Meetings with System Administrator to discuss development and user environment issues (licenses and OS)				
Design Complete				
Development				
Develop Application According to System Requirements and the *IT Application Group Programming Standards.* Coordinate with users, Project Leader, and technical personnel to resolve issues as necessary. DOCUMENT!				

Project Development Action	Status	Scheduled Start	Scheduled Completion	Actual Completion
Application Manager Product Demonstration (do NOT install or demo a new application without AM approval)				
Meet with users to demonstrate. Alterations will be entered on the Implementation Issues Log.				
Modify application as necessary based on user input.				
Completion of Demonstration Review Signature Form (although you may demonstrate multiple times only one signature is necessary unless otherwise directed by Project Leader).				
Acquisition & Install of Hardware and Software (these should also be found in budget sheets) This can be copied from Section 3.0 above.				
HW and SW Acquisition Complete as per Section 4.0				
Link to Project Cost / Budget Spreadsheet				
Conversion				
Prepare Conversion Plan				
Execute Preliminary Conversion				
Test Conversion (repeat as necessary)				
Final Conversion prior to go-live				
Interfaces				
Test Interfaces (documentation in the Interface Design and Management Plan)				
Implement Interfaces				
Quality Assurance Testing				
Prepare Quality AssuranceTesting Plan				
Implement Test Plan				
Check for satisfaction of System Requirements. The user should evaluate these – not the developer or project leader.				
Testing Complete				
Ready for Live				
Quality Issues recorded in Implementation Log				
Training				
Prepare Training Plan				
Initial User Manual Ready				
Implement Training Plan				
Training Complete				
Go-Live Preparation				
Conversion Complete				
Hardware Installed				
Software Installed				

Project Development Action	Status	Scheduled Start	Scheduled Completion	Actual Completion
Live Date				
Project Acceptance				
Satisfaction of all System Requirements				
30 Days since implementation				
All errors corrected				
Completed User Manual				
Completion of Final System Acceptance Form				
Fully Implemented				
Maintenance and Support				
Prepare Application Support and Maintenance Plan for this application				
Notify User in Writing of Maintenance and Support Plan Implementation				
Add the cost of this maintenance to our annual Operating Budget				
Prepare Change Control Plan				
Update Software Installation Instructions in Track-It				
Update Software in DML				
Update Common Knowledge Base Wiki to include reference to this new application				
Implement Maintenance and Support Plan				
Post-Project Evaluation				
Complete Post-Project Evaluation				
Complete Manhours analysis in Budget spreadsheet.				
Complete Budget spreadsheet with all costs of this project.				

Training Plan

1. Identify classes needed.
2. Identify location and times for each class.
3. Identify students in each class and inform them that their attendance is mandatory.
4. Certify attendance of students.

Class	
Location	
Time	

Student Name	Informed of Class (Yes or No)	Confirm Attendance (Yes/No)

Conversion Plan

Instructions: Track the conversion planning and testing via the record on the master project list. Use the templates below to plan your conversion. These tables can be copied and added to as necessary to accommodate multiple tests.

1. Environment and Configuration Identification

What is the TEST Server Name	
Describe how access to the subject application is achieved on the TEST Server	
If the vendor is updating this remotely, has the vendor signed the VPN Vendor Access Agreement?	
Has security been set up for the users to test the application with the converted data?	

2. Table and Field Mapping
   A. Identify "from" tables and fields for the data that needs to be converted.
   A. Identify the "to" tables and fields for the data identified in the previous step.

Field Mapping Template

From Table	From Field	Field Description	To Table	To Field

3. Identify methodology/steps of conversion. These should be the steps that you would use to guide yourself through the process to ensure that nothing is forgotten.

Step	Action	Completed?

2. Identify who will perform the conversion and what their responsibilities are.

Team Member	Responsibility

3. Identify when the conversion will occur and how the conversion will be tested. Will the user enter query on the data, go record-by-record to look for problems, will there be a side-by-side comparison of the data?

Date of Test Conversion	
Method of Conversion Testing	
Items to Test	**Result**

4. Complete actual conversion on the date and time when planned prior to go-live.

Date of Final Conversion	
Method of Conversion Testing	
Items to Verify	**Result**

5. Record on the project master record that the conversion was completed successfully. If NOT, then record in this plan what did not work as planned and indicate how it will be dealt with. Mark each problem as it is resolved until conversion is complete.
6. Once the conversion has been successful, the users should engage in Quality assurance Testing (see the following section) in order to verify that calculations, etc. all function.

Quality Assurance Testing Plan

1. Identify what program components will be tested. This can be general in nature, perhaps on a module basis, but the user is still responsible for testing all of the pieces of the module, even though it may not be spelled out here.
2. Identify the personnel that will conduct the tests.
3. Identify where and when the tests will be conducted. The developer or implementer should always be present for some of the testing.
4. If the user is satisfied with the result of the test, then record it. This is very simple, either it works or not and the user is satisfied or not. If there is a problem with the software at this point, it should be recorded in the Implementation Issues Log.

Program Component	Testing Personnel	Location of Test	Result

Vendor Software Support Plan

1. Identify support personnel.
2. Identify hours of support.
3. Identify if help desk can assist with support.
4. Identify modification process.
5. Create FAQ for users if they have repetitive questions about the same issues.
6. Notify user *in writing* of the information in items 1-5 above. Email does not count.

Software Name				
Project Leader Name			**Phone**	
Vendor / Developer Contact Name			**Phone**	
Support Hours	**From**		**To**	
IT Help Desk Number				
After-Hours Help (if necessary)				
Frequently Asked Questions (FAQ)				
Question		**Answer**		

Change Control for Vendor Software

Development Group Support Plan

1. Identify support personnel.
2. Identify hours of support.
3. Identify if help desk can assist with support.
4. Identify modification process.
5. Create FAQ for users if they have repetitive questions about the same issues.
6. Notify user *in writing* of the information in items 1-5 above. Email does not count.

Software Name				
Project Leader Name			**Phone**	
Vendor / Developer Contact Name			**Phone**	
Support Hours	**From**		**To**	
IT Help Desk Number				
After-Hours Help (if necessary)				
Frequently Asked Questions (FAQ)				
Question		**Answer**		

Section 9: Post Project Evaluation

Instructions: *At the conclusion of the project, this form should be filled out in order to evaluate the overall management of the project. This calls for an honest assessment of the things that worked and didn't work for this project.*

Goals

Goal 1: Finish Project On-Time

Criteria for Success		Success?
Finish the Project According to the time-line established at when the vendor is contracted (NOT when we establish a potential goal during annual pre-planning).		
Schedule	**Results**	
Was the implementation completed on schedule?		
If there was a delay, what caused it?		
Was this a realistic schedule to begin with?		

Goal 2: Finish Project within Budget

Criteria for Success		Success?
Complete the Project within the parameters established when the contract was signed with the vendor. This amount MUST be within the budgeted amount specified for the project during the budgeting process.		
Budget		
Did this project come in on or under budget?		
If not, then why not?		
How can you avoid repeating these mistakes in the future?		

Customer Department Business Goals

	Goal	Criteria for Success	Success?
3			
4			
5			

Project Success and Failure Comparison

Implementation Successes (Things that worked well)		
Item	**Why do you think this worked?**	**Is this a practice you would employ in future projects?**

Implementation Failures (Things that did not work well)		
Item	**Why did this fail?**	**How will you avoid this in the future?**

Team Member Evaluations

Instructions: *This section is to be copied elsewhere for use by the Project Management Team only. Staff Members should be evaluated honestly and fairly on their performance on this project so that the same mistakes are not repeated on their next endeavor. This section should be copied to a secure location - this is to be used only as a template and not for storing evaluations.*

Name	**Performance Comments - What was done right/wrong and how can they improve?**	**Has this been addressed with the employee?**