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| **Initiation Phase**  ***Project Idea 🡪 Project Definition 🡪 Charter Approval*** | | | | | |
|  | **Project Activity** | **Notes** | **Deliverable** | **Tool/Template** | **Project Office Actions** |
| I1 | Initiate the Project (Proposal) | The objective of the Proposal is to provide sufficient information to determine if a project has merit. Proposals may fall under the governance of the ISSC or the CIO. Proposals are submitted to the Manager, Project Office, CCS. The Manager will then present all Proposals for approval and prioritization:  - For Enterprise projects at ISSC meeting.  - For CIO projects at CCS Portfolio & Resource  Management Meeting. | * Proposal * Approval to proceed with defining the project * Project Sponsor identified | * Proposal Template * What is a Project? * What is a ProjectLite? * Budget Estimation & Tracking Tool | * Review Proposal for completeness * Add Proposal information to Eclipse * Arrange Prioritization Meetings * File Proposal in Project Repository * Link approved Proposal to Eclipse |
| I2 | Define the Project (Project Charter) | * Refer to the guidelines outlined in *Italics* in the Project Charter template. * Review Lessons Learned and other historical data from similar projects. * Solicit input from key Stakeholders including departmental Subject Matter Experts (SMEs). * Charter approval date is the “Start Date” of a Project. | Project Charter | * Project Charter template * Lessons Learned * Budget Estimation & Tracking Tool * Project Team Roles Definition * Project Risks Examples |  |

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| **Initiation Phase**  ***Project Idea 🡪 Project Definition 🡪 Charter Approval*** | | | | | |
|  | **Project Activity** | **Notes** | **Deliverable** | **Tool/Template** | **Project Office Actions** |
| I3 | Hold Peer Review Meeting | The objective of the Peer Review is to encourage debate, to assess impact and interdependencies on other departments, and to make a judgment on the technical/business merit of a project before it is approved.   * Charter Author and Sponsor invite CCS Management team and applicable staff, and present Project Charter, table questions, and address concerns. | Peer Review  Acceptance | Peer Review Checklist |  |
| I4 | Submit Project Charter to Project Office | * Manager, Project Office will review final version for completeness, and determine appropriate Charter approval level – CIO (Chief Information Officer) or ISSC (Information Systems Steering Committee). * Project Office will then assign a project number and make arrangements for the Project Charter approval meeting. |  |  | * Assign Project # * Obtain Charter approval * File Charter in Project Repository |
| I5 | Obtain Project Charter approval and Secure Funding | To obtain Project Charter approval, the Manager of the Project Office will either hold a Charter approval meeting with the CIO, or the Charter will be presented at the next ISSC meeting (by the Charter Author(s) on date advised by ISSC Secretary).  Once approved, the Project Office will transfer the approved budget to the project, if applicable, and assign the Project Manager to the project. | * Project Charter approval * Project Manager assigned * Funding transfer to Project Office Organization |  | * Complete Project Office section in Charter * If funding is approved, create project in FAST and initiate budget transfer * Update Eclipse * File documents in Project Repository * Link approved Project Charter to Eclipse |
| **🡪 Trigger to “Planning” Phase: Project Charter Approval** | | | | | |

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| **Planning Phase**  ***Identify who does what work and when*** | | | | | |
|  | **Project Activity** | **Notes** | **Deliverable** | **Tool/Template** | **Project Office Actions** |
| P1 | Develop Detailed Project Plan | The Project Plan is the controlling document that articulates how the project will be executed, and is used as a baseline against which to monitor project progress, cost and schedule. Depending on the size and complexity of the project, the Project Plan could be a single document, or it could be a collection of documents consisting of more comprehensive management plans for some of the other activities in the Planning Phase. | Project Plan | * Project Plan Template * Project Test Plan Template (for Quality Management Plan section) * Project Team Roles Definition |  |
| P2 | Develop Work Breakdown Structure (WBS) | The WBS is a deliverable-oriented grouping of project elements which organizes and defines the total scope of the project. It subdivides the project work into smaller, more manageable pieces, with each descending level representing an increasingly detailed definition of the project work.  Include the WBS as an Appendix to the Project Plan and use it as the starting point for the project Schedule. | WBS | Project WBS Template (Under Construction) |  |
| P3 | Develop Project Schedule | From the WBS, and working with project team leads and SMEs, identify the tasks associated with each deliverable, and assign start and end dates and owners. | Project Schedule | MS Project Template, Excel Template, or Worksheet in Eclipse |  |

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| **Planning Phase**  ***Identify who does what work and when*** | | | | | |
|  | **Project Activity** | **Notes** | **Deliverable** | **Tool/Template** | **Project Office Actions** |
| P4 | Develop Quality Management Plan | The Quality Management Plan describes how the project will implement its quality assurance and control, and defines the processes that will be taken to prevent and remove defects. It should also outline measuring and tracking mechanisms, test matrices and plans, configuration management strategy, and the standards and procedures that may already be a part of CCS standard operating procedures. | Project Quality Management Plan | * Quality Management Plan * Project Test Plan Template |  |
| P5 | Develop Communication Plan | Ensure your Communication Plan includes all parties impacted by the Project, and that the information conveyed is relevant to each particular audience. Indicate the timing for each of the communications, and who is responsible for delivering it. | Project Communication Plan | Project Communication Plan Template |  |
| P6 | Obtain Project Plan Approval | Review the completed Project Plan with the Project Sponsor, key Stakeholders and departmental SMEs. If the Project Charter was approved to only develop the Project Plan, or if additional resources are required, then submit to Project Office and request to present Project Plan to CIO/ISSC for approval. | Project Plan approved |  | * Update Schedule and cost baselines in Eclipse * File in Project Repository * Link Project Plan to Eclipse |
| P7 | Acquire New Resources | Internal Job Posting (term):   * Create Job Description and submit request to HR. * Contact Project Office for funding FOAPAL, and Department Administrator for office space. * Conduct interviews and hire appropriate candidate.   External Contract:   * Working with Purchasing Department, create contracts for professional/consulting services and submit to Project Office for processing. | * Job Description * Contract with Statement of Work (SOW) | Professional Services Agreement | Liaise with Purchasing to create and deliver Purchase Order to vendor |
| **🡪 Trigger to “Execution & Control” Phase: Project Plan Approval** | | | | | |

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| **Execution & Control Phase**  ***Carry out the Project Plan, track progress, communicate, and report project status*** | | | | | |
|  | **Project Activity** | **Notes** | **Deliverable** | **Tool/Template** | **Project Office Actions** |
| E1 | Conduct Kick-off Meeting | The Kick-off meeting lays out the mode of operations for the Execution Phase of the Project and allows Project team members to gain a clear understanding of the objectives, commitments, and their roles in meeting the objectives. Review the project Schedule and deliverables, what is in-scope and out-of-scope, establish frequency of project team meetings and other logistics as identified in the Kick-off Meeting Checklist. |  | * Kick-off Meeting Checklist |  |
| E2 | Purchase Project Supplies | Submit all procurement paperwork to the Project Office for processing. Refer to Project Office Budget Procedures (located in Tools and Templates/Tools on the Project Office website), and to the Carleton University Purchasing Policy at: http://www.carleton.ca/purchasing/policies.htm |  | * Purchase Requisition * P-Card Requisition | Process and file procurement paperwork |
| E3 | Monitor and Control Project | * Issues & Risks: Review open issues and risks at Project status meetings and update them regularly in Eclipse. * Project Schedule: Manage and take corrective action as necessary to keep project on track. * Project Spending: Ensure costs are kept within the bounds of the budget established in the Project Plan. Track funds spent and committed in [FAST](http://apps.carleton.ca/ccs/gen/projectoffice/training_links/IntroductionToFAST1_3.pdf). * External Contracts: Monitor progress and deliverables in accordance with the Statement of Work (SOW). |  | * Project Plan: Issue Mgmt and Risk Mgmt Sections * Professional Services Agreement | * Report on budget status * Update Eclipse with month end budget metrics * Process payment of invoices |

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| **Execution & Control Phase**  ***Carry out the Project Plan, track progress, communicate, and report project status*** | | | | | |
|  | **Project Activity** | **Notes** | **Deliverable** | **Tool/Template** | **Project Office Actions** |
| E4 | Report on Project Performance | * + Update Eclipse with the Monthly Status of the project based on monthly input from the project team (accomplishments, next steps, issues and risks).   + Send progress reports to key Stakeholders periodically by providing the link to the project status website. | Monthly Status Report | * Project Communication Plan Template * Eclipse | * Provide [monthly summary reports](http://apps.carleton.ca/ccs/gen/projectoffice/summary_reporting/default.asp) of all projects at Operational Reviews and ISSC meetings |
| E5 | Request, Track and Control Change Requests | The objective of the CCS Project Change Control Procedure is to have a consistent method of identifying and requesting changes to the **project** **scope** established in the Project Charter, to assess the benefit of those changes, and to determine the impact on the execution of the project. The Project Change Request template provides a mechanism for approving changes and communicating them to project Stakeholders.  When a Project Change Request is approved, update the Project Plan and communicate the information to the project team and Stakeholders. | * Project Change Request * Change Request approval decision by CIO or ISSC * Update Project Plan based on approved change | Project Change Request Template | * Update Project Change Log with submitted requests * File Change Requests * Allocate additional funding to the project if applicable * Update project metrics in Eclipse if applicable * Link approved Project Change Request to Eclipse |
| E6 | Monitor and Control Schedule and Budget | Take corrective action as necessary to keep project on track.  It is the responsibility of the Project Manager to ensure that costs are kept within the bounds of baseline budget established in the Project Plan. |  | Project Schedule | * Track the project funds spent and committed in FAST. |
| E7 | Provide Training and Hand Over to Support Personnel | Conduct training and hand-over Procedures as identified in the Project Plan under the “Training & Support Plan” section. |  |  |  |

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| **Execution & Control Phase**  ***Carry out the Project Plan, track progress, communicate, and report project status*** | | | | | |
|  | **Project Activity** | **Notes** | **Deliverable** | **Tool/Template** | **Project Office Actions** |
| E7 | Complete Project Work | * Review the Go-Live Checklist and ensure that all actions have been completed. * If applicable, notify the Change Advisory Board (CAB) by submitting a Request for Change (RFC) to your Manager two weeks prior to going live. * Ensure all project Stakeholders have been notified. * Go live with delivered system, service or product. * Officially hand over maintenance & support. | Go-live | Go-Live Checklist |  |
| **🡪 Trigger to “Closure” Phase: Go live with system, service, or product** | | | | | |

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| **Closure Phase**  ***Formally complete the project*** | | | | | |
|  | **Project Activity** | **Notes** | **Deliverable** | **Tool/Template** | **Project Office Actions** |
| C1 | Verify Project Completion | Ensure all components of the Project have been completed and signed off. | Project Sponsor Sign-off |  |  |
| C2 | Hold Post-mortem Meeting | Invite all Project Stakeholders and send a Project Post-mortem Questionnaire prior to the meeting. Review what went well, what could be improved and identify Lessons Learned. Discuss if success criteria defined in Project Charter were met and identify shortcomings. |  | Project Post-mortem Questionnaire |  |
| C3 | Close Project Contracts | Ensure all paperwork has been submitted to the Project Office for processing. |  |  | * Process all invoices * Close Purchase Orders |
| C4 | Complete all Project Administration (Project Final Report) | Complete Project Final Report, finalize all other project documentation, and ensure the final versions of all key deliverables have been submitted to the Project Office for archiving.  Send link of your Project status website to all project Stakeholders.  Final Report Date is the “End Date” of the project and should be the end of the month. | Project Final Report | Project Final Report Template | * File project documents * Close Project in Eclipse (Project closure date is always at the end of the Month) * Link Final Report to Eclipse |
| C5 | Celebrate and Communicate Accomplishments | Organize some form of recognition, e.g.; event, gift, announcement to celebrate your Project team's hard work and overall success. |  | Project Communication Plan |  |
| C6 | Disband Project Resources | Provide feedback to team members' Managers on their work on the Project. Disperse equipment and workspace. |  |  |  |
| **🡪 Project Completion: All project deliverables completed and Project Sponsor sign-off** | | | | | |