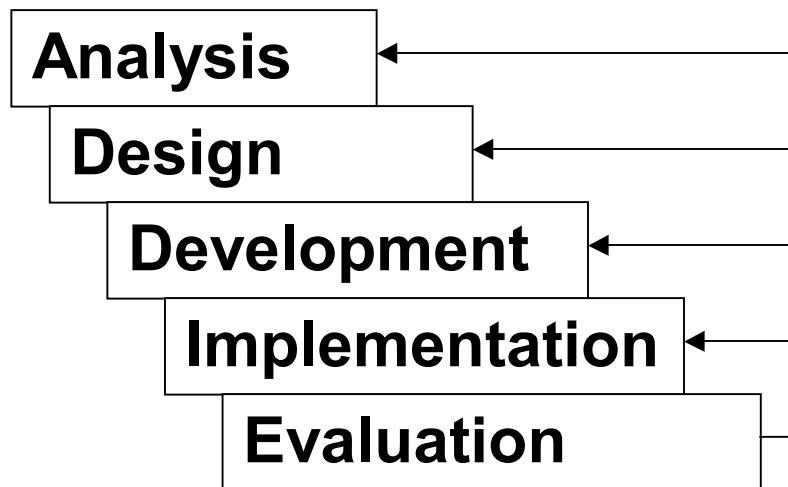


A PROJECT MANAGER'S CHECKLIST

featuring



INSTRUCTIONAL DEVELOPMENT ARTIFACT

MONDAY, APRIL 28, 2003

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Instructions

This checklist is designed to help you anticipate the items that will need to be completed during the life of the project you are managing. Keep this checklist close by so you can check off the items that have been completed, keep track of items that need to be addressed, and plan ahead for obstacles that may occur.

Analysis

Analysis Management

- Meet with the client
 - Verify/clarify information on the Request for Training (RFT) or the Request for Proposal (RFP)
- Set up and run the team kick-off/start-up meeting
- Create an Analysis Management Plan
 - Who is responsible for what deliverable
 - Set timeline

Performance Assessment

- Review plans to conduct the Performance Assessment
- Anticipate Subject Matter Expert (SME) and potential for client involvement
- Attend important meetings
- Review data collected for accuracy and comprehensiveness
- Review Performance Gap
- Submit to client for endorsement
- Review Purpose Statement
- Submit to client for endorsement

Instructional Goals

- Review Instructional Goals
- Submit to client for endorsement

Learner Analysis

- Review plans to conduct the Learner Analysis
- Anticipate Subject Matter Expert (SME) and potential for client involvement
- Attend important meetings
- Review data collected for accuracy and comprehensiveness
- Submit to client for endorsement

Resource Analysis

- Review plans to conduct the Resource Analysis
- Anticipate Subject Matter Expert (SME) and potential for client involvement
- Attend important meetings
- Review data collected for accuracy and comprehensiveness
- Submit to client for endorsement

Probable Delivery Systems

- Review options that include training
- Review options that do not include training
- Review cost estimates for options

Project Management Plan

- Create a Project Management Plan
 - Compose an Executive Summary
 - Define the Project Charter
 - Specify Project Objectives
 - Establish Overview of Deliverables
 - Define the Project Scope
 - List all Primary Stakeholders and their roles
 - List all Assumptions
 - List all possible Constraints
 - Create a Risk Management Plan
 - List all possible Risks
 - Establish a Risk Index for each listed risk

- List all possible Contingencies for each listed risk
- Develop plans for Quality Assurance
- List all possible Resources that may be needed
- Determine appropriate Team Members or Contractors
- Develop plans for Communication
 - Within the team
 - With the client
 - With all other stakeholders
- Select or modify an Instructional Design Model
- Create a Work Breakdown Structure
- Create a realistic Budget
- Create a realistic Timeline
- Submit to client for endorsement
- Client & Team Member kick-off/start-up meeting
 - Distribute Project Management Plan to all team members

Analysis Summary

- Obtain client endorsement for completed Analysis Summary
- If training is recommended, obtain client approval to continue into Design Phase

Design

Task Inventory

- Review plans to conduct the Task Inventory
- Anticipate Subject Matter Expert (SME) and potential for client involvement
- Attend important meetings
- Review completed Task Inventory
- Submit to client for endorsement

Performance Objectives

- Revise and Review Performance Objectives
- Submit to client for endorsement

Testing Strategies

- Review Testing Strategies
- Submit to client for endorsement

Return on Investment

- Calculate Return on Investment (ROI)
- Submit to client for endorsement

Design Brief

- Obtain client endorsement for completed Design Brief
- Obtain client approval to continue into Development Phase

Development

Instructional Strategies

- Review Instructional Strategies
- Submit to client for endorsement

Supporting Media

- Review Supporting Media selected or developed
- Submit to client for endorsement

Learner Guide

- Review Learner Guide
- Submit to client for endorsement

Facilitator Guide

- Review Facilitator Guide
- Submit to client for endorsement

Formative Evaluation & Revisions

- Review plans to conduct Formative Evaluations & Revisions
- Anticipate Subject Matter Expert (SME) and potential for client involvement
- Attend important meetings
- Submit to client for endorsement
- Overview occurring Formative Evaluations & Revisions

Pilot Test

- Review plans to conduct the Pilot Test, including observation and debriefing strategies
- Attend important meetings
- Help obtain appropriate facilities, equipment, instructor(s), and members of the target audience
- Invite client and evaluation team to the Pilot Test
- Submit to client for endorsement
- Attend Pilot Testing

Learning Resources

- Complete final review and revisions
- Obtain client endorsement for completed Learning Resources
- Obtain client approval to continue into Implementation Phase

Implementation

Reproduction of Learning Resources

- Assure materials are reproduced according to specifications
- Submit to client for endorsement

Distribution of Learning Resources

- Assure materials are properly distributed and stored
- Submit to client for endorsement

Learners

- Review Learner Identification Plan
- Review Preparation of Learner Plan
- Review Scheduling of Learner
- Submit to client for endorsement

Facilitators

- Review Facilitator Selection Plan
- Review Preparation of Facilitator Plan
- Review Scheduling of Facilitator
- Submit to client for endorsement

Implementation Strategy

- Obtain client endorsement for completed Implementation Strategy
- Obtain client approval to continue into Evaluation Phase

Evaluation

Quality Assurance

- Verify product with Quality Assurance Plan
- Submit to client for endorsement

Evaluation Tools

- Review selected evaluation methods
- Submit to client for endorsement

Summative Evaluation

- Review plans to conduct Summative Evaluation
- Attend important meetings
- Submit to client for endorsement
- Overview occurring Summative Evaluation

Evaluation Plan

- Obtain client endorsement for completed Evaluation Plan

Completed Project

- Obtain client endorsement for completed Project

Appendices

Appendix A: Guidelines for Controlling a Project Phase

With permission from Michael Greer's

The Project Manager's Partner: A Step-By-Step Guide To Project Management (2001)

Instructions: Follow these steps to control a particular project phase or activity. You may use the check boxes to mark items as completed.

Step 1: Review the project plan carefully and get a clear picture of what the desired results of this phase are in terms of deliverables, schedules, costs, quality, and minimized risk.

Project plan is reviewed, overall desired results are identified.

Step 2: Prepare to inspect results of the phase (work product, deliverables). To make these preparations, consult the detailed project plan and do the following:

Locate all lists of criteria that may be applied to inspect the quality and completeness of the deliverables in light of the time frame you are examining. (For example, if this is the third week in January, examine the plan to find out exactly what stage of development and at what quality level the deliverables should be the third week in January.)

Locate milestones and schedule events that relate to the time frame in which you are conducting the inspection. (For example, if this is the third week in January, examine calendars and schedules to see what should be accomplished around this week.)

Locate the budget. Note particularly if there are expected dollar amounts that should be expended in the current time frame.

Locate contractors' proposals and/or contracts. Note exactly what they have committed to supply (deliverables, reports, etc.).

Locate the risk management plan, if one has been created. Note particularly whether any of the ongoing events or upcoming events are identified in the risk management plan as particularly vulnerable to risk.

Step 3: Inspect project results by examining actual deliverables to date, discussing results to date with project team members, and reviewing progress reports.

Deliverables are examined.

Results are discussed with team members responsible.

Progress reports are reviewed.

Step 4: Decide whether to accept the inspected deliverables and work processes or to take corrective action such as:

- Insisting on rework of deliverables to conform to specifications
- Making adjustments to work process to prevent deviations
- Decision to accept or require rework is made.
- Decision to modify work process is made.

Step 5: As appropriate, make updates to the project plan and scope, including:

- Revised deliverables estimates
- Revised schedule estimates
- Revised cost estimates
- Updates to the risk management plan

Step 6: Create a list of lessons learned that describes the ways subsequent project activities must be modified in order to prevent difficulties encountered.

- List of lessons learned is created.

Step 7: Complete evaluation checklists (if applicable) and file them as part of the official project records.

- Evaluations are completed and filed.

Appendix B: Keeping Things Moving

A “To Do” List and Items to Help You Execute, Control, and Close Out Your Project

With permission from Michael Greer’s

The Project Manager’s Partner: A Step-By-Step Guide To Project Management (2001)

Instructions: After your project plan is approved and you are up and running, you can use the checklist below and the attached items to help you keep things moving according to your plan.

Go through this list at least weekly for each project you are managing.

CHECK YOUR PROJECT’S SCOPE.

Refresh your memory about your project’s goals and boundaries. In particular, make sure you have a clear picture of what the desired results should be at this point relative to deliverables, schedule costs, quality, and so on.

(See Worksheet: Project Scope Statement under Action Item: Describe Project Scope if you don’t already have a formal scope statement.)

CHECK YOUR DELIVERABLES.

Analyze the status of each project deliverable. Are they evolving as planned? If appropriate:

1. Locate *lists of quality criteria* that may be applied to inspect the quality and completeness of the deliverables at this stage of the project.
2. Check *contractors’ proposals or contracts* to make sure you know what they should be supplying at this point.
3. Inspect all project deliverables.
4. Decide whether to accept inspected deliverables or to require rework.

(See Worksheet: Project Deliverables Status Analyzer.)

CHECK YOUR SCHEDULE.

Examine your milestones, key dates, and critical path. Are you where you need to be?

ANALYZE VARIANCES (DEVIATIONS FROM PLAN) BY COMPARING “ESTIMATED” TO “ACTUAL.”

1. Are activities taking longer than planned? (Are you exceeding estimates of duration?)
2. Are you using more resource hours than you planned?
3. Are your actual costs exceeding your estimated costs?
4. If minor variances are discovered (variances that can be resolved easily without changing the plan or scope), then resolve them.
5. If major variances are discovered (variances that change the scope or constitute significant project issues), then handle them as described in the steps below.

(See Worksheet: Variance Analyzer.)

❑ ADDRESS SCOPE CHANGES.

1. Identify changes in scope (changes in deliverables, schedule, costs, etc.).
2. Handle scope changes, if necessary.

(See Guidelines: Handling Scope Change and Worksheet: Project Scope Change Order.)

❑ LIST, TRACK, AND TRY TO RESOLVE OPEN ISSUES.

1. Make a list of all the unresolved issues, or
2. Revisit the list of open issues from the last inspection period and try to resolve them.

(See Worksheet: Project Issue Tracker.)

❑ REVISIT POTENTIAL PROJECT RISKS.

1. Locate the Risk Management Plan, if one has been created.
2. Note particularly whether any of the ongoing events or upcoming events are identified in the risk management plan as particularly vulnerable to risk.

❑ REPORT PROJECT STATUS.

1. After completing the checks above, if you haven't already done so, talk to your team members and determine their perspective on project status.
2. Create and circulate a project status report.

(See Worksheet: The Project Status Report.)

❑ DRIVE FOR CLOSE-OUT OF ACTIVITIES AND ENDORSEMENT OF DELIVERABLES AS APPROPRIATE.

1. Ask yourself, "What activities can I close out? Which deliverables can I get formally approved and signed-off?"
2. Prepare and get signatures on endorsement forms as appropriate.

(See Worksheet: Sample Project Endorsement Form under Action Item: Close Out Project Activities.)

❑ DECIDE WHETHER IT'S NECESSARY TO KILL THE PROJECT, THEN DO SO IF APPROPRIATE. (See Appendix E: Guidelines—When to Kill the Project.)**❑ CREATE A LIST OF LESSONS LEARNED.**

Create a list of lessons learned that describes the ways subsequent project activities must be modified in order to prevent the difficulties encountered up to this point.

❑ COMPLETE APPROPRIATE EVALUATION CHECKLISTS.

Complete evaluation checklists, if applicable, and file them as part of the official project records.

References

- Greer, Michael. (1992). *ID Project Management: Tools and Techniques for Instructional Designers and Developers*. Englewood Cliffs, NJ: Educational Technology Publications.
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- Shackelford, Bill. (2002). *Project Managing E-Learning*. Alexandria, VA: ASTD.