



# INNOVATION

## PROJECT MANAGEMENT PLANNING TOOLKIT



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# Who Should Use the Innovation Tool Kit?



## Audience:

Salt Lake City employees starting a non-IT project and who are new to the project management framework. Use this toolkit to your advantage—grab the templates and resources you need. You're not required to use everything.

If you have questions on how to get started, identifying the best templates to use on your project or questions on this toolkit please reach out to the Innovation Team:

- Hailey Leek, Innovation Team Lead at [Hailey.Leek@slc.gov](mailto:Hailey.Leek@slc.gov)
- Marti Woolford, Senior Innovation Consultant at [Marti.Woolford@slc.gov](mailto:Marti.Woolford@slc.gov)

*"Steering a ship is easy; it's thinking like a captain that's hard." - Fozzie Bear*

## Types of Projects:

City projects that are big or small, external or internal. This toolkit is designed for the non-traditional project manager but includes traditional project management templates ensuring every project is well-documented and structured for success.

To get support from the Innovation Team, submit your request using the [Project Idea Intake Sheet](#). The Innovation and Project Management Team will review your request and assign the best person to help with your project.

## Why Use This Toolkit?

- **Simplified Project Management:** The Innovation Team has simplified the Project Management Institute's framework.
- **5 Steps to Success:** We break down project management into five easy steps, each equipped with the templates you need to move a successful project along.
- **Real-World Examples:** Picture scheduling a crucial meeting—we weave this scenario throughout to show you exactly how each template works.
- **Team-Friendly Tools:** Whether you're steering the ship or part of the crew, these templates are your compass to smooth sailing and triumphant project finishes. Get your team on board and chart your course to success!

## SPECIALIZED SUPPORT



### IT Projects

For IT projects contact Brandi Thompson at [Brandi.Thompson@slc.gov](mailto:Brandi.Thompson@slc.gov) or Cat Cosby at [Cat.Cosby@slc.gov](mailto:Cat.Cosby@slc.gov)



### Change Management

For Change Management contact Leah Smith at [Leah.Smith@slc.gov](mailto:Leah.Smith@slc.gov)

# Introduction

## Welcome to the Salt Lake City Innovation Project Management Toolkit!

**Let's face it—not all of us are official project managers.** Many of us have learned on the fly, tackling projects out of necessity. We've developed our own systems through trial and error to get things done. Meanwhile, official project managers often have formal training and education, equipped with specialized skills for managing complex projects. Whether you're a seasoned pro or just figuring it out as you go, our toolkit is here to help you succeed!

Before starting your next project, explore our handy templates and tools. This toolkit provides:

- Step-by-step guidance
- Structured support
- Essential templates

For more on formal project management, visit the [Percipio Library](#) on the City's Employee University. We recommend starting with these videos:

- [CAPM® Project Management Key Concepts](#)
- [Project Management Plans](#)

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## Process

This toolkit is here to help non-official project managers with every stage of a project beginning with **initiating, planning, executing, monitoring & controlling**, and **closing**. Inside, you'll find ready-to-use tools with clear instructions on how and when to use them.

## What's Not Included:



- Budgets
- Compliance
- Legal Planning

*For support in these areas, please consult your department or division leadership.*

While this toolkit sticks to traditional project management methods, we've streamlined each step and resource to be concise, practical, and packed with value. No shortcuts here—we've figured out what works and what doesn't to give you the best tools for success. Get ready for an efficient and effective project management experience!

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## Toolkit Examples



This toolkit includes examples to show how the templates can be used. The example project is scheduling an important meeting with the Mayor's Office involving multiple departments and busy department directors. Using this toolkit can help you manage both big and small projects.

Clean versions of the templates can be found in the Appendices.



Questions? Send us an email: [Innovation@slc.gov](mailto:Innovation@slc.gov)

# What is Project Management?

*To better understand project management, it is important to understand a few key terms and concepts.*



## Key Terms

- **Adoption** occurs in a project when the end-users of a product or service who are impacted by a change incorporate the new solution into their business processes.
- A **business case** is a document that outlines the "why" statement for the project. The business case should highlight the benefits that the organization is likely to gain upon the completion of the project or initiative.
- The **critical path** is the longest sequence of dependent tasks that must be completed from the start to the finish of a project. The critical path determines the shortest possible duration of the project and directly impacts the project's end date in the event of any task delays.
- The **current state** describes an organization's current situation or business processes.
- A **customer** is a stakeholder (or stakeholders) who has a vested interest in the outcome of the project and typically defines the requirements and parameters of the project. For the City customers can often be other departments using IMS or other centralized services, or it could be constituents of the City using City services.
- **Deliverables** are tangible or intangible outputs, results, or products produced as part of a project. Deliverables fulfill project objectives and are specified in the project's scope. Deliverables must have clear, pre-defined criteria that can be measured and support the overall goals and objectives of the project. Deliverables must meet these pre-defined criteria before they can be considered complete.
- Project **dependencies** are tasks that rely on the start or completion of other tasks before they can be performed or completed. Project dependencies determine the sequence in which tasks must be performed and lead to the "critical path" of a project timeline. Types of dependencies include Finish-to-Start, Start-to-Start, Finish-to-Finish, and Start-to-Finish.
- **External stakeholders** are the individuals impacted by the actions and outcomes of a project but not directly involved in the project work.
- A **Gantt chart** is a visual tool that displays the project schedule, outlining the start and end dates of individual tasks and their dependencies. Tasks are represented by horizontal bars with the length of the bar corresponding to the duration of the task.
- Impact is the overall effect the change will have on a stakeholder. Typically impacts in an organization will either be people, process, or technology impacts.
- **Issues** are problems that have already happened.



## Key Terms Continued

- A **Key Performance Indicator (KPI)** is a metric that shows progress toward a specific project objective. KPIs indicate project performance.
- A **milestone** is an indicator of project progress and is used to divide a project into discrete phases. A milestone typically indicates that a major goal, task, achievement, or event within a project has been reached. Missing or meeting milestones can also indicate overall progression of a project and assist project managers in adjusting expectations and timelines.
- A **project** is a temporary endeavor with a start and finish undertaken to create a unique product, service, or result. In other words, a project has a start and end date. Whereas a program is on-going with no clear end date. A project requires planning and organization to define and manage the tasks and activities that get you to the desired outcome[1].
- **Project assumptions** are beliefs about expected events or circumstances during a project, based on experience or available information, which can impact project success. Examples include resource availability and stakeholder participation.
- A **project charter** is a formal document that is created at the beginning of a project to give the project manager formal project authority. The project charter should be brief and include the project purpose, scope, stakeholders, and deliverables.
- A **project constraint** is any limitation on a project that directly impacts resources or support available to the project team. Constraints must be factored into work to achieve project objectives.
- **Project management** is the application of knowledge, skills, tools, and techniques to project activities to meet project requirements. It's the practice of planning, organizing, and executing the tasks needed to turn a brilliant idea into a tangible product, service, or deliverable[2]. In other words, project management is the job of making things happen.
- **Project objectives** are specific and measurable and must meet the time, budget, and quality requirements of the project. Your project objective is your scope statement and objectives lay out what your team needs to deliver.
- A **project plan** is a detailed outline of all the elements needed to ensure the project's goals and objectives will be achieved. The project plan provides direction to the project team and maintains accountability for individual tasks. The project plan should always be the one source of truth throughout the duration of the project.
- A **project proposal** is a document outlining everything stakeholders should know about a project, including timeline, budget, objectives, and goals. Project proposals can also be called a business case.

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[1] K. Kogan; S. Blakemore; J. Wood. Project Management for the Unofficial Project Manager.

[2] Project Management Institute. <https://www.pmi.org/about/what-is-project-management>



## Key Terms Continued

- **Resistance** in change management refers to the reluctance for people to adopt the change. Resistance can have many sources, but often will be vocal resistance of those sharing in meetings or with leaders. Or there can be the silent resisters that quietly disengage from the change effort.
- **Resource management** is the process of planning the project resources that will be needed for various durations of the project.
- **Risk management** is the process of proactively identifying, analyzing, and responding to risk factors throughout the lifecycle of a project.
- A **risk** is any uncertain event that could significantly impact project deliverables and may be positive or negative.
- A **schedule** or **project timeline** is a chronological, visual representation of the overall schedule of a project. Timelines outline planned tasks, milestones, and deliverables and ensure each task or phase has defined start and end dates. The goal of the project timeline is to coordinate project activities, allocate resources, and track project progress.
- A project **scope** is a high-level outline of all the work that needs to be done to meet project objectives. The project scope provides the framework for the project, manages expectations, outlines resources and timelines, and ensures all stakeholders have a common understanding of project objectives. Critical elements of a project scope include objectives, deliverables, work that needs to be completed, inclusions (in scope), exclusions (out of scope), limitations or constraints, assumptions, timelines, and resources.
- **Scope creep** happens when key stakeholders add new tasks or deliverables to a project that are outside the scope of work. Scope creep should be closely monitored by project managers as it can significantly impact the project timeline or deliverables.
- A **scope statement** is a simplified statement that outlines the project inclusions and exclusions, timeline, and deliverables.
- A **status report** or status update is a document that outlines the progress of a project within a specific time period. The status report provides a high-level overview of the current state and highlights any items that need immediate stakeholder attention.

# What is Project Management *Continued...*



## Key Roles

- A **Project Manager** is the person assigned by the department or division to lead the team that is responsible for achieving the project objectives[3]. This person has an important job of planning and completing the project. Project managers use their technical skills, ability to work with others, and understanding of emotions to handle tricky project situations.
- A **Project Team** is a group of people who work together to achieve project goals and objectives[4]. The project team members are the people who are responsible for executing the tasks and producing the deliverables outlined in the project plan. Essentially, these are the people doing the project work.
- **Project Sponsors** are the key stakeholders who oversee and support the project. Project sponsors are responsible for developing requirements, providing strategic direction, securing resources, making executive-level decisions, monitoring project progress, communicating with stakeholders, supporting the project team, and celebrating success.
- **Project Stakeholders** are the people who are directly impacted by the project. Stakeholders come in many different forms and occupy many different roles in a project. They may be directly involved with project work as a resource or a member of the core project team or they may be more indirectly involved as an interested party or an impacted system or product user.
- The **Steering Committee** is a group of high-level stakeholders that provide guidance, oversight, and strategic direction for a project. They make key decisions, monitor progress, resolve issues, and advocate for the project, ensuring its success and alignment with the City's goals. On big projects, it's key to have an active and engaged committee.

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[3] Project Management Institute.

[4] K. Kogan; S. Blakemore; J. Wood. Project Management for the Unofficial Project Manager.



# Project Management Framework



## Deep Dive

- **[PMI or the Project Management Institute](#)** developed a framework containing guidelines for project management professionals. The PMI framework involves a well-defined set of techniques, tools, processes, rules, and methodologies that promote best practices in project management. The PMI framework is globally acknowledged as the standard PM framework and is used widely across the world. This framework will be utilized throughout this toolkit.
- The resources in this toolkit draw heavily on process-based and highly organized project management, developed by the Project Management Institute. Other forms of project management include Agile (including practices of Scrum), waterfall or critical path method (CPM). You're encouraged to research other forms to see what works best for your project.

## Process Groups

The Innovation Program Management Toolkit utilizes five process groups, or in other words, follows five essential steps. The process groups are **initiation**, **planning**, **execution**, **monitoring** and **controlling**, and **closure**.



**Initiating:** Processes to start a new project or phase.



**Planning:** Processes to define and outline the project plan and execution strategy.



**Executing:** Processes to complete project tasks and activities.



**Monitoring and Controlling:** Processes to track, monitor, report, and manage project performance.



**Closing:** Processes to finalize and complete a project or phase.

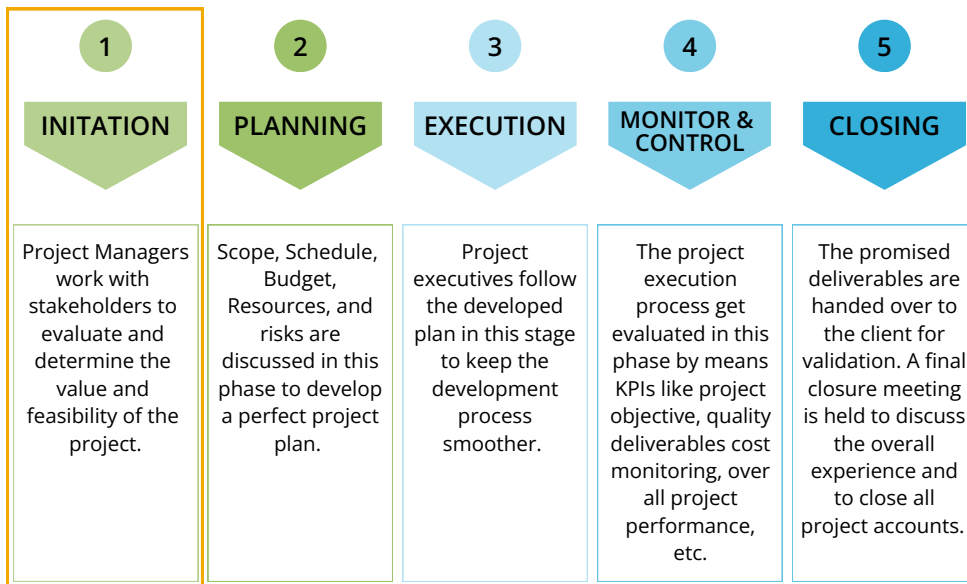
## Why So Many Processes & Templates?

Completing each template may seem like a lot of work, but it will pay off by setting clear expectations and providing a deep understanding of the project. These templates will keep you organized, help you address any issues, and serve as tools to track successes and milestones. Templates and additional resources are available on the [Innovation Project Management SharePoint](#).

**TIP:** Consider transferring or adapting these templates to Smartsheet, Excel, or another project management platform. Or use Word or a PDF like an OG.

# Step 1: Initiating

## Simplified Project Management Framework



The **initiation phase**, it's like the project's grand debut—a time when the Project Manager and stakeholders gather to decide if the project is not only worth doing but also feasible to pull off successfully.

### Before you begin, ask yourself:

- *Why am I doing this project?*
- *What will happen if I don't?*
- *Can I mentally and physically handle this?* 😊 Yes, you can!

It's important to understand the need for the project and the impact it will have at the very beginning. To set the foundation early for the need and scale of the project you'll begin by preparing a project charter and scope statement. They might seem like similar documents; however, they serve different purposes.

The key tools used by Project Managers in the Initiation phase are:

- **Project Charter** provides the "why" and "what" of the project at a high level
- **Scope of Work** provides the "how" and "what's included" in the project in detail.
- **Resource Plan** outlines the resources needed to complete a project included people, tools, materials, finances and time.
- **Key Sponsor & Stakeholder Management** keeps all of your project's key players organized

### What is the difference between a Project Charter and Scope of Work?

Document	Purpose	Focus	Audience
<b>Project Charter</b>	Authorizes the project and provides a high-level overview.	Includes project objectives, key stakeholders, high-level requirements, project risks, and overall goals.	Typically aimed at senior management and stakeholders to secure approval and funding.
<b>Scope of Work</b>	Specifics of what is included and excluded from the project and defines project deliverables.	Details project scope, objectives, deliverables, constraints, and assumptions.	Primarily intended for the project team and stakeholders involved in execution and delivery.

# Project Charter

A **project charter** has one main purpose: it authorizes the project. A charter gives permission to a project manager to use defined resources (staff time, City money, etc.) to complete a project, and it assigns a project sponsor. Your project sponsor gives the project manager the green light and red light along the way and can be your advocate.

A charter spells out the project's purpose, goals, and target end date. Think of it as the blueprint that guides everyone involved in the project from start to finish. Since many projects are managed across departments, this approval also serves notice to other teams that their cooperation will be needed.

Once the charter has been approved and signed, any changes to it should be made by the sponsor and project team. The Project Manager should also complete a change request when a change in the project is needed (see Change Request template).

<b>Project Name</b>	Scheduling an Important Citywide Meeting
<b>Date</b>	May 29, 2024
<b>Project Start Date</b>	June 3, 2024
<b>Project End Date</b>	July 12, 2024
<b>Project Manager</b>	Chris

Project Team				
Name	Title	Department	Role	Email
Chris	Senior Innovation Consultant	IMS	Project Manager	Chris@slc.gov
John	Senior Innovation Consultant	IMS	Project Support	John@slc.gov
Jane	Senior Innovation Consultant	IMS	Project Support	Jane@slc.gov
Steering Committee & Sponsor				
Name	Title	Department	Role	Email
Quinn	Mayor's Advisor	Mayor's Office	Executive Sponsor	Quinn@slc.gov

Key Stakeholders				
Name	Title	Department	Role	Email
Phil	Director, Planning & Design Division	Public Lands	Key Stakeholder	Phil@slc.gov
Shelley	Director, Housing & Neighborhood Development	Community & Neighborhoods	Key Stakeholder	Shelley@slc.gov

<p><b>Strategic Alignment:</b> <i>Which of the City's strategic objectives or Mayoral priorities does this project support?</i></p>	<ol style="list-style-type: none"> <li>1. City Goals: Does this project align with the Mayor's Priorities? If so, name the Priority: <ul style="list-style-type: none"> <li>o NA</li> </ul> </li> <li>2. Master Plan: Does the project align with a Master Plan? If so, name the title of the Master Plan(s): <ul style="list-style-type: none"> <li>o NA</li> </ul> </li> <li>3. City or State Ordinance: Does the project align with a City or state ordinance? If so, name the ordinance: <ul style="list-style-type: none"> <li>o NA</li> </ul> </li> </ol>
<p><b>Project Purpose &amp; Description:</b> <i>Justify the project by listing the key reasons why this project should happen and provide a concise overview of the project.</i></p>	<p>A meeting has been requested by the Mayor's Advisor (Executive Project Sponsor) to bring together leaders from various departments within the City. The meeting aims to foster inter-departmental communication, address cross-functional issues, and strategize city-wide initiatives.</p>
<p><b>Scope Statement:</b> <i>Clearly define the project's boundaries, including what it will and won't address. Briefly list the criteria for successful completion. Keep this summary short.</i></p>	<p>The scope of this project involves organizing and scheduling a meeting with department directors. This includes identifying suitable meeting times for all participants, booking a meeting room, preparing and distributing the meeting agenda, ensuring necessary equipment is available, and documenting and distributing the meeting minutes promptly.</p>
<p><b>Goals:</b> <i>Provide a couple broad and general goals about what this project aims to accomplish. Goals are long-term and provide direction and purpose and are often qualitative.</i></p>	<ul style="list-style-type: none"> <li>• <b>Align Team Members:</b> Ensure all team members are on the same page regarding project progress and tasks.</li> <li>• <b>Address Issues Promptly:</b> Identify and resolve any project-related issues quickly.</li> <li>• <b>Optimize Meeting Efficiency:</b> Conduct meetings that are productive and respect participants' time.</li> </ul>

<p><b>Objective:</b>  <i>Project objectives break down the steps needed to achieve those goals, they're specific and measurable. Provide a couple of SMART (specific, measurable, achievable, relevant and time-based) objectives.</i></p>	<ul style="list-style-type: none"> <li>• <b>Schedule Meeting:</b> Confirm a meeting time that suits all key participants within the next day.</li> <li>• <b>Send Meeting Invitations with Agenda 48 Hours Prior:</b> Distribute meeting invitations and a detailed agenda at least 2 days before the meeting.</li> <li>• <b>Distribute Meeting Minutes Within 24 Hours Post-Meeting:</b> Ensure meeting minutes are documented and distributed to all participants within a day after the meeting.</li> </ul>
<p><b>High-Level Requirements:</b>  <i>These guide the project's direction and ensure alignment with its objectives. While detailed requirements are identified during planning, identify key success factors now, such as user experience, equity, integration, security, maintenance, and budget.</i></p>	<p>NA</p>
<p><b>Risks:</b>  <i>What could go wrong or obstacles this project might face? Risks may or may not occur, but it's worth thinking about them and being ready to address them.</i></p>	<ul style="list-style-type: none"> <li>• <b>Scheduling Conflicts:</b> Mitigate by using Scheduling Assistant to find data and time that works for everyone.</li> <li>• <b>Participant Availability:</b> Ensure early communication and RSVPs.</li> <li>• <b>Technical Issues:</b> Arrange for technical support and test equipment beforehand.</li> </ul>
<p><b>Opportunities:</b>  <i>Are there other projects and resources that could align and support this project?</i></p>	<p>NA</p>
<p><b>Project Governance:</b>  <i>Governance refers to the rules, procedures, and policies that guide how projects are managed, including the project's structure, the roles of those involved, and the decision-making process. Basically, who authorize this project so it can move forward? Who signs off on key milestones?</i></p>	<ul style="list-style-type: none"> <li>• All major decisions will be decided by the Sponsors</li> <li>• Project manager will relay decision to project team and employees</li> <li>• Project manager will keep sponsor updated via weekly progress reports</li> </ul>
<p><b>Budget:</b>  <i>What is the estimated cost of the project?</i></p>	<p>NA</p>

## Summary Milestone Schedule:

Outline important project milestones, include dates and how long each phase will take.

Phase	Date	Milestone/Tasks
Planning	June 3-7	<ul style="list-style-type: none"><li>• <b>Clarify the Purpose:</b> Determine the main reasons for the meeting. What are the key issues to be discussed?</li><li>• <b>Set Objectives:</b> Define specific goals and desired outcomes for the meeting.</li><li>• <b>Identify Participants</b></li><li>• <b>List Key Participants:</b> Identify leaders from each relevant department who need to attend.</li></ul>
	June 10-14	<b>Secure meeting location and date</b> <ul style="list-style-type: none"><li>• <b>Determine Room Requirements:</b> Consider the number of attendees, necessary equipment (e.g., AV setup), and accessibility.</li><li>• <b>Book the Room:</b> Reserve the venue once the date and time are finalized.</li></ul>
	June 17-21	<ul style="list-style-type: none"><li>• <b>Outline the topics</b> to be discussed, time allocations for each topic, and the order of discussion.</li><li>• <b>Finalize the Agenda:</b> Incorporate feedback and finalize the agenda.</li><li>• <b>Send calendar invite</b></li></ul>
	June 24-28	<ul style="list-style-type: none"><li>• <b>Prepare Materials:</b> Gather any documents, presentations, or reports needed for the meeting.</li><li>• <b>Send Reminders:</b> Send reminder emails a few days before the meeting.</li><li>• <b>Confirm Attendance:</b> Verify RSVPs and follow up with any unresponsive participants.</li></ul>
Execute	July 1-5	<b>Day of Meeting, July 1st</b> <ul style="list-style-type: none"><li>• <b>Arrive Early:</b> Arrive at the meeting location early to set up and ensure everything is in order.</li><li>• <b>Take Meeting Minutes/Notes:</b> Take detailed notes or record the meeting to capture key points and decisions</li></ul>
Project Closing	July 8-12	<b>Post-Meeting Follow-Up</b> <ul style="list-style-type: none"><li>• <b>Distribute Minutes/Notes:</b> Compile and distribute meeting minutes, highlighting key decisions, action items, and assigned responsibilities.</li><li>• <b>Action Items:</b> Follow up on action items and deadlines agreed upon during the meeting.</li></ul>

### TIP:

As you move through these templates it might seem like you're repeating yourself. In project management tools, repetition often occurs because it's crucial to reinforce key information and ensure clarity among team members. This repetition helps to avoid misunderstandings, keeps everyone aligned with the project's goals and processes, and serves as a reminder of critical steps or deadlines. It's like a steady beat in music—it keeps everyone in sync and moving forward together. Therefore, copy and paste when needed!

# Scope of Work

The **project scope** of work template takes the scope from the charter and expands on it. It's essential that this template is done collaboratively with the project team. As a result, you are much more likely to get buy-in from your whole team.

A **scope statement** is a clear definition of the boundaries of a project and defines what the project will deliver. It includes the project's constraints, assumptions and key success factors. The main goal of a scope statement is to make sure that the project team and stakeholders have the same understanding and goals for the project's success. Unlike a charter, scope documents are considered "living" documents, and as new information is discovered it can be modified.

### When writing your scope statement:

- **Avoid using jargon, acronyms or insider terms.** A lot of different people across multiple departments and specializations will be reading this. There is a space at the bottom of the template to provide definitions for extra clarity.
- **Keep it short.** This should be a quick reference guide for the project.

### TIP:

Avoid scope creep by completing a detailed charter and scope statement that outlines what is and is not included in the project. Scope creep happens when someone, like a sponsor, adds new tasks or deliverables to a project that is outside the scope of work. A project that isn't clear and keeps evolving won't be successful.

<b>Project Name</b>	Scheduling an Important Citywide Meeting
<b>Completed by</b>	Chris, Project Manager
<b>Date</b>	June 1, 2024
<b>Project Duration</b>	Approximately 5-weeks from start to finish.
<b>Project Manager</b>	Chris

Project Team				
Name	Title	Department	Role	Email
Chris	Senior Innovation Consultant	IMS	Project Manager	Chris@slc.gov
John	Senior Innovation Consultant	IMS	Project Support	John@slc.gov
Jane	Senior Innovation Consultant	IMS	Project Support	Jane@slc.gov

Project Sponsor				
Name	Title	Department	Role	Email
Quinn	Mayor's Advisor	Mayor's Office	Executive Sponsor	Quinn@slc.gov
Key Stakeholders				
Name	Title	Department	Role	Email
Phil	Director, Planning & Design Division	Public Lands	Key Stakeholder	Phil@slc.gov
Shelley	Director, Housing & Neighborhood Development	Community & Neighborhoods	Key Stakeholder	Shelley@slc.gov

<p><b>Executive Summary:</b> Provide a summary of the project's purpose, scope, and objectives. This summary should be the same summary you used for the project charter.</p>	<p>This project involves scheduling an important meeting with department leadership to discuss critical agenda items and make decisions. The goal is to ensure all participants are informed and prepared, leading to a productive and successful meeting.</p>
<p><b>Success:</b> How will success be measured and what metrics will you use?</p>	<ul style="list-style-type: none"> <li>• <b>High Attendance:</b> At least 90% of invited leaders attend the meeting.</li> <li>• <b>Effective Discussions:</b> Key issues are addressed, and actionable strategies are developed.</li> <li>• <b>Documented Outcomes:</b> Clear documentation of meeting outcomes and action plans.</li> </ul>
<p><b>Deliverables:</b> Project deliverables are goods or services – tangible or intangible – produced by the project. These are what you will measure and use to assess your project's success. To determine deliverables, think about what this project will yield or produce. For example, a report, a document, software, a good, a service, etc.</p>	<ul style="list-style-type: none"> <li>• <b>Meeting Agenda:</b> A detailed agenda outlining the topics to be discussed.</li> <li>• <b>Participant List:</b> A comprehensive list of attendees from each department.</li> <li>• <b>Logistics Plan:</b> Details on the venue, equipment, and other logistical arrangements.</li> </ul>



<p><b>Acceptance Criteria:</b>  <i>Establish clear conditions that deliverables must meet for stakeholders and customers to approve them. They set the standards for when the final project is complete and ready, helping ensure the project meets client and constituent's expectations</i></p>	<ul style="list-style-type: none"> <li>• Clear and concise meeting meetings and action items are sent out 24-hours after the meeting concludes.</li> </ul>
<p><b>Exclusions:</b>  <i>List everything this project will not accomplish or include.</i></p>	<ul style="list-style-type: none"> <li>• <b>Post-Meeting Actions:</b> Follow-up tasks or actions resulting from the meeting are not included in the scheduling process.</li> <li>• <b>Non-Participant Issues:</b> Concerns or issues related to individuals not attending the meeting will not be addressed.</li> </ul>
<p><b>Constraints:</b>  <i>What could limit the project's success? Time, cost, scope, quality, and resources are all constraints to consider. You address how to work through these constraints in the "Assumptions and Constraints Template."</i></p>	<ul style="list-style-type: none"> <li>• <b>Schedules:</b> It may be hard to find a time that works with everyone's schedules.</li> <li>• <b>Meeting location:</b> It may be challenging to find a meeting room that will accommodate the number of people invited to the meeting.</li> </ul>
<p><b>Assumptions:</b>  <i>List factors that you expect to happen during the project. Assumptions can be based on past experiences, City knowledge or an educated guess on events or circumstances that may impact the project. You address how to work through these assumptions in the "Assumptions and Constraints Template."</i></p>	<ul style="list-style-type: none"> <li>• You assume your team will complete milestones according to schedule.</li> <li>• <b>Availability of Participants:</b> All key stakeholders will be available at the proposed meeting time.</li> <li>• <b>Prompt Responses:</b> Invitees will respond to the meeting invitation in a timely manner.</li> </ul>
<p><b>Definitions:</b>  <i>Define any key terms, roles or jargon that will need clarification so there won't be any confusion, and everyone understands and uses the correct term.</i></p>	<ul style="list-style-type: none"> <li>• <b>Stakeholder:</b> Any individual or group with an interest in the project's outcome.</li> <li>• <b>ROI (Return on Investment):</b> A measure of the profitability of an investment or project.</li> </ul>

# Resource Plan

A **Resource Plan** outlines the resources needed to complete a project including people, tools, materials, finances and time. This high-level plan will help you manage your resources wisely. As your project planning progresses, it is recommended to add additional details and move it into a Gantt chart with a work breakdown schedule and total cost. *This plan ultimately helps you figure out if the people and resources you need to complete the project are available during the project timeline.*

<b>Project Name</b>	Scheduling an Important Citywide Meeting
<b>Date</b>	April 16, 2024
<b>Project Start Date</b>	June 1, 2024
<b>Project End Date</b>	July 8, 2024
<b>Project Manager</b>	Chris

Resource (People or Items)	Task	Department	Planned Start	Planned End	Planned Hours	Cost
Chris	Schedule Meeting	IMS	June 1	July 8	30	NA
John	Take meeting minutes	IMS	July 1	July 1	2	NA

# Key Sponsors & Stakeholder Management

Identify any **Executive Sponsors, Sponsor Coalitions, or Key Stakeholders** involved in or affected by the project. Include their roles and responsibilities. **Project stakeholders** include individuals, customers, departments, or organizations actively involved in the project or affected by its execution and completion.

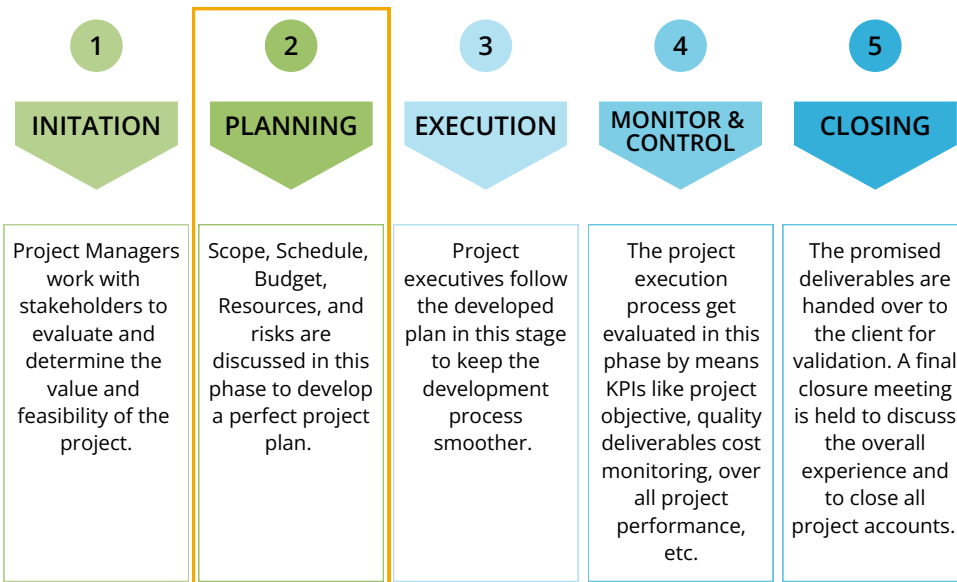
<b>Project Name</b>	Scheduling an Important Citywide Meeting
<b>Completed by</b>	Chris
<b>Version #</b>	1
<b>Date Prepared</b>	June 1, 2024

*Influence and Impact is measured in low, medium and high.*

Name	Title	Department	Role in Project	Responsibilities	Influence	Impact	Email
Quinn	Mayor's Advisor	Mayor's Office	Sponsor	Provide technical policy advice	High	High	Quin@slc.gov
Shelley	Director Housing & Neighborhood Development	Community & Neighborhoods	Stakeholder	Provide feedback on meeting and if it was success	Medium	Low	Shelley@slc.gov
Phil	Planning & Design Division Director	Public Lands	Stakeholder	Attend meeting and share input	Low	Medium	Phil@slc.gov

# Step 2: Planning

## Simplified Project Management Framework



The second phase is **planning** the project, where the Project Manager and team create a detailed project plan. As described in "Project Management for the Unofficial Project Manager," the scope statement acts as a compass, indicating direction, while the project plan serves as a roadmap, detailing how to get there. This phase begins once the initiation phase is approved by all stakeholders.

The key tools used by Project Managers in the **Planning** phase are:

- **Assumptions and Constraints:** Project assumptions are events or circumstances that could impact project success, while project constraints are limitations like schedule and budget.
- **Communications Plan:** Helps manage how information is shared.
- **Risk Management Plan:** Helps reduce risks by anticipating them beforehand.
- **Work Responsibility: RASCI Chart:** Helps organize team tasks and clarifies who leads each task or deliverable.
- **Schedule:** Organize project milestones, activities, and deliverables.
- **Project Kickoff Meeting:** Coordinate a meeting with team and Sponsors to ensure project alignment, motivation, and ongoing clarity.

### TIP:

Some templates may seem like they're asking you to predict the future, which isn't possible. Instead, use your experience to anticipate potential issues that could arise during the project. For instance, no one foresaw the pandemic, but we had to adapt quickly. These templates are proactive tools designed to help you plan and adapt smoothly to unexpected changes.

# Assumptions & Constraints

**Project assumptions** are beliefs about expected events or circumstances during a project, based on experience or available information, which can impact project success. Examples include resource availability and stakeholder participation. **Project constraints**, like scope, schedule, and budget, are limitations imposed on the project, which must be worked within to achieve objectives. Project constraints usually include budget, time and meeting deadlines.

**Throughout the project life cycle, the project team should refine and re-analyze assumptions and constraints.**

Assumption	Result or Impact
Engagement	Participants will actively engage and contribute to the discussion.
Technology Reliability	Technology will function correctly and not cause delays or errors during the meeting.
Constraint	Mitigating Actions
Physical Space	Availability of a suitable meeting room if it's an in-person meeting
Agenda Complexity	The amount of content that needs to be covered may require multiple sessions.

# Communications Plan

Begin developing the **Communications Plan** and update it as the project progresses. A good communication plan helps manage how information is shared with stakeholders throughout the project.

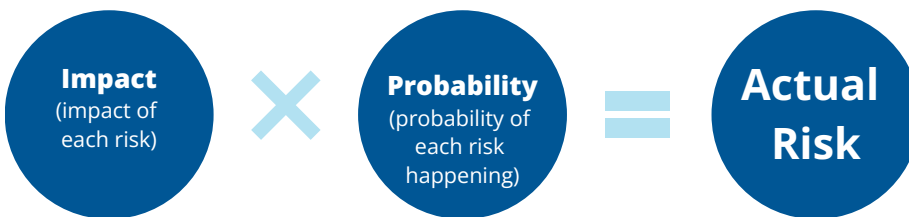
<b>Project Name</b>	Scheduling an Important Citywide Meeting
<b>Date</b>	April 16, 2024
<b>Project Start Date</b>	June 1, 2024
<b>Project End Date</b>	July 8, 2024
<b>Project Manager</b>	Chris

Topic	Delivery Date	Audience	Key Message	Message Source
	<i>Determine when message will be delivered and how frequent</i>	<i>Who will be receiving communication</i>	<i>What is the most important information, keep it short</i>	<i>Who will be sending out this message? Mayor, Sponsor, Director?</i>
Meeting Kick-off announcement	<b>June 28:</b> 5 days before the meeting and send a reminder the day before the meeting takes place	Stakeholders	Purpose of the meeting with action items and responsible parties	Project Sponsor will send initial meeting email with key message, Project Manager will send reminder email
Post Meeting Follow Up	<b>July 8</b>	Meeting attendees	Share action items and notes	Project Manager

# Risk Management Plan

**Risk management** is a key part of project management. It involves reducing risks by anticipating them and communicating with stakeholders effectively. **Risks** are potential problems that could affect the project, while **issues** are problems that have already happened. This assessment is subjective, while the scoring makes you select the impact and likelihood of it happening. For risks that score 12 or higher, you will need to identify a strategy to reduce them in the Risk Management Plan.

## Risk Matrix



Impact Score	
5	Worst-case Scenario
4	Relatively Important Impact
2	Minimal Impact

Probability Score	
5	High Likelihood
3	Possible
1	Unlikely

#	Risk	Impact	Probability	Score I x P = R
1	<i>Meeting gets canceled</i>	4	3	12
2	<i>Technical difficulties during meeting</i>	2	3	6

## Risk Management Plan

**Focus on high risks and plan on how you will address them.** To address risks, you may choose to:

- Transfer the risk: shift to a third party
- Accept the risk: acknowledge and deal with it if it occurs
- Mitigate the risk: reduce its probability or impact
- Eliminate the risk: do what you must to make it go away

Risk	Score	Strategy or Action	Who	Due Date
<i>Meeting gets canceled</i>	12	<b>Accept the risk:</b> <i>Communicate the importance of the meeting listing out meeting topics. If it gets canceled, reschedule immediately.</i>	<i>Project team and sponsors</i>	6/3
<i>Technical difficulties during meeting</i>	6	<b>Eliminate the risk:</b> <i>Head to the meeting location in advance and test our tech equipment.</i>	<i>Project manager and team members</i>	6/3

# Work Responsibility: RASCI Chart

Have you ever been unsure who was responsible for what on a project? For this toolkit, we highlight the **RASCI chart**, which stands for Responsible, Accountable, Support, Consulted, and Informed. You're encouraged to also explore other tools like a Work Breakdown Structure or Gantt Chart.

**A RASCI chart helps organize team tasks and clarifies who leads each task or deliverable.**

While the project manager usually creates this chart, it's beneficial to complete it as a team for transparency and role clarification. Sharing and discussing the RASCI chart with the project team ensures everyone understands their responsibilities. At the end of the day, you need to know what everyone is doing and what their tasks are.

- **R = Responsible:** This person who will complete the task. Every task needs at least one responsible party, but it's okay to assign more.
- **A = Accountable or Approver:** This person assigns the work and approves the deliverables before it's marked complete. Each task should ideally have one accountable person.
- **S = Supportive:** The person or persons who will assist the responsible person with the activity.
- **C = Consulted:** The person or persons who provide insight and direction into the activity. They will not do the actual work. Their input is based on their expertise in an area.
- **I = Informed:** This person receives status updates, usually stakeholders who receive regular updates on the project.

Title of Process or Project:				
Task	Employee or Stakeholder Title	Employee or Stakeholder Title	Employee or Stakeholder Title	Employee or Stakeholder Title
	Chris, project manager	Quinn, executive sponsor	Jane, project team member	John, project team member
<i>Schedule Meeting</i>	<i>R</i>			
<i>Write and send email update to key project stakeholders</i>	<i>R</i>	<i>I</i>		<i>S</i>
<i>Schedule kick off meeting</i>	<i>C</i>		<i>S</i>	<i>A</i>
<i>Compile key project data</i>	<i>C</i>		<i>S</i>	<i>R</i>
<i>Prepare agenda</i>	<i>R</i>	<i>C</i>	<i>S</i>	<i>S</i>



# Schedule

In project management, a **schedule is a listing of a project's milestones, activities, and deliverables**. A **deliverable** is a specific item or result that must be completed and provided to stakeholders as part of a project. Using a spreadsheet or Smartsheet is ideal but not mandatory for creating a project schedule.

**Dependencies** and **resources** are typically defined for each task, followed by estimating start and finish dates based on resource allocation, budget, task duration, and scheduled events. A **Work Breakdown Structure (WBS)** divides tasks into smaller components, assigning numbers to key tasks. Dependencies are tasks that rely on others to start or finish, determining the order of work. Resources, such as people, equipment, and budget, must be efficiently allocated to complete tasks on time and within scope.

<b>Project Name</b>	Scheduling an Important Citywide Meeting
<b>Completed by</b>	Chris
<b>Version #</b>	1
<b>Date Prepared</b>	June 1, 2024

Work Breakdown Schedule (WBS)	Status	% Done	Deliverables or Tasks	Work Hours	Duration	Start Date	End Date
1	On time	100%	Schedule Meeting	3	4 days	Jun 1	Jun 4
1.1	On time	100%	Task 1: Send Initial Meeting Announcement	1	1	Jun 1	Jun 2
1.1.2	On time	50%	Task 2: Confirm Availability and Send Calendar Invites	.5	1	Jun 2	Jun 3
1.1.3	Delayed		Task 3: Prepare Agenda and Materials	1	1	Jun 3	Jun 4
1.1.4	Delayed		Task 4: Send Reminder Emails	.5	1	Jun 4	Jun 4

# Project Kickoff Meeting

After defining the project scope, timeline, and risks, gather the project team for a **kickoff meeting**. Include the Sponsor to provide a motivational message and overview of the project. This meeting ensures everyone is aligned and informed. Utilize this template throughout the project to maintain clarity and momentum during project meetings.

<b>Project Name</b>	Scheduling an Important Citywide Meeting
<b>Kickoff Date</b>	June 3, 2024
<b>Project Start Date</b>	June 3, 2024
<b>Project End Date</b>	July 8, 2024
<b>Project Manager</b>	Chris

Project Team		
Name	Role	Focus
Chris	Project manager	Overall project coordination
Quinn	Executive Sponsor	Project endorsement and motivation
John	Project team	Agenda & materials preparation. Technical setup and support.
Jane	Project team	Project support

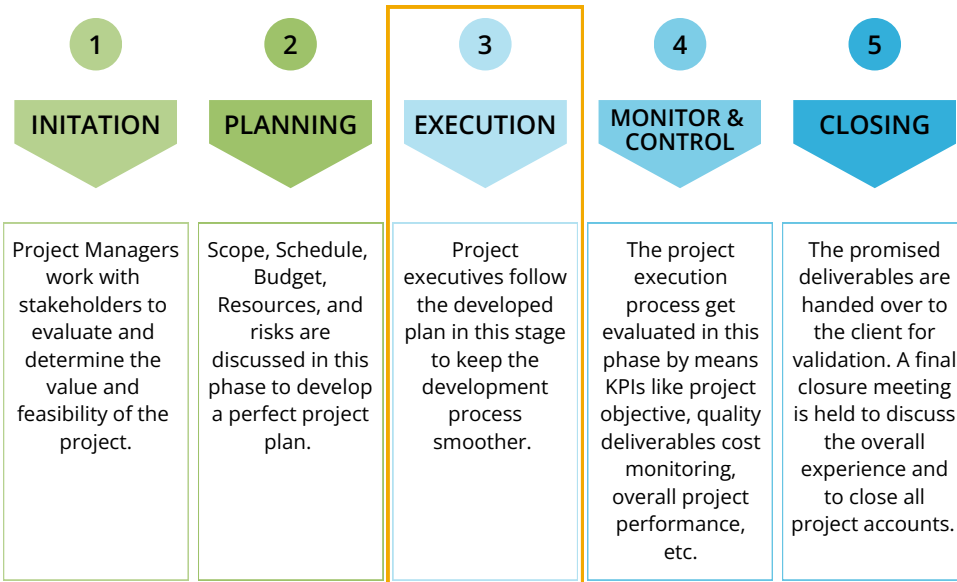
Steering Committee & Sponsors				
Name	Title	Department	Role	Email
Quinn	Mayor's Advisor	Mayor's Office	Executive Sponsor	Quinn@slc.gov

Key Stakeholders				
Name	Title	Department or Division	Role	Email
Phil	Planning & Design Division Director	Public Lands	Key Stakeholder	Phil@slc.gov
Shelley	Director Housing & Neighborhood Development	Community & Neighborhoods	Key Stakeholder	shelley@slc.gov

<p><b>Sponsor Message:</b> Provide a motivational message and an overview of the project to align the team and emphasize the project's importance.</p>	<p>The purpose of this project is to ensure efficient and effective scheduling of meetings, enabling smooth communication and collaboration within the team. This project aims to streamline the scheduling process, ensuring all participants are informed and prepared, ultimately enhancing project outcomes.</p>
<p><b>Project Purpose &amp; Description:</b> Provide a short summary on why this project is being pursued and its potential benefits to the City.</p>	<p>Scheduling an important meeting is crucial to get everyone on the same page about our goals, solve urgent problems, and explore new growth ideas. This meeting will help different teams work together and make sure everyone is involved in making decisions. Having this meeting soon will make our organization run more smoothly and help us achieve our plans.</p>
<p><b>Scope:</b> Clearly define the project's boundaries, including what it will and won't address.</p>	<p>Schedule a meeting that brings together directors, deputy directors, and other leaders from Salt Lake City departments and/or divisions to discuss a solution for problem.</p>
<p><b>Timeline &amp; Milestones:</b> Share a brief timeline include major milestones.</p>	<ul style="list-style-type: none"> <li>• Schedule meeting – beginning of June</li> <li>• Meeting scheduled – mid June</li> <li>• Meeting debrief and send out project updates – mid June</li> </ul>
<p><b>Known Issues/Challenges:</b> Briefly share a high-level overview known challenges facing the project.</p>	<ul style="list-style-type: none"> <li>• Physical Space: Availability of a suitable meeting room if it's an in-person meeting</li> <li>• Agenda Complexity: The amount of content that needs to be covered may require multiple sessions.</li> </ul>
<p><b>Project Governance:</b> Governance refers to the rules, procedures, and policies that guide how projects are managed, including the project's structure, the roles of those involved, and the decision-making process. Basically, who authorize this project so it can move forward? Who signs off on key milestones?</p>	<ul style="list-style-type: none"> <li>• All major decisions will be decided by the Sponsors</li> <li>• Project manager will relay decision to project team and employees</li> <li>• Project manager will keep sponsor updated via weekly progress reports</li> </ul>
<p><b>Next Steps</b> What can everyone expect after this meeting concludes?</p>	<ul style="list-style-type: none"> <li>• Host major meeting and have a debrief following it. Share meeting minutes and next steps.</li> </ul>

# Step 3: Execution

## Simplified Project Management Framework



The key tools used by Project Manager in the **Execution** stage are:

- The **Four Foundational Behaviors** will help you build the trust and influence needed to fully engage your project team and reach your project goals. They are:
  1. **Demonstrate Respect:** Show empathy and integrity.
  2. **Listen First:** Inspiration starts when you listen first, then talk later.
  3. **Clarify Expectations:** Communicate how each person's role contributes to the whole.
  4. **Practice Accountability:** Remind the team that everyone's commitments are crucial for project success.
- **Team Accountability Session:** Helps ensure the project stays on task with regular check-ins.
- **Conversation Planner:** Tool for planning hard conversations.



The **execution** phase is where plans come to life. Here, the project team focuses on completing deliverables on time through regular meetings to track progress and updates. This phase also emphasizes accountability, ensuring everyone contributes their fair share. Just like in a group project, it's the project manager's job to hold the team accountable, even if it means having tough conversations. To support this, we provide tools not only for project management but also for preparing and handling difficult discussions.

### TIP:

Successful project execution revolves around people. No matter how advanced your plans and processes are, it's the people—each with their own lives, personalities, and bosses—who make it happen. By keeping your team engaged through accountability, constructive feedback, and celebrating milestones, you're far more likely to complete your project on time and within budget.

# Team Accountability Session

You worked planning the project, now it is time to make sure it is going as planned. **Team Accountability Sessions** (like a status review meeting) are regularly scheduled meetings to find out if the project is on track or if anybody needs help.

<b>Project Name</b>	Scheduling an Important Citywide Meeting
<b>Date</b>	June 6, 2024
<b>Project Start Date</b>	June 3, 2024
<b>Project End Date</b>	July 8, 2024
<b>Project Manager</b>	Chris
<b>Attending</b>	Chris, John, and Jane

<b>Report on Last Week's Commitments</b>	Visited the conference room and double checked the technology and ensured we have all the correct cords and connections to the screen.
<b>New Commitments</b>	Order coffee and bagels for the meeting and send out a reminder the day before the meeting.
<b>New Issues or Risks</b>	Lack of communication and response by a stakeholder. It is recommended that the project manager should be cc'd on email or follow up personally.
<b>Other</b>	NA

# Conversation Planner

The **Conversation Planner** helps you prepare for a tough conversation. Start by defining your intent: why do you need to have this discussion? Gather the facts and examples of the behavior or mistake. Next, consider the impact these issues have on the project. Being clear about your reasons will set the stage for a productive conversation. Once you've written everything down, you'll be ready to schedule the meeting.

<b>Project Name</b>	Scheduling an Important Citywide Meeting
<b>Date</b>	June 7, 2024
<b>Project Start Date</b>	June 3, 2024
<b>Project End Date</b>	July 8, 2024
<b>Project Manager</b>	Chris
<b>Attending</b>	Chris, John, and Jane
<b>With whom?</b>	John
<b>When?</b>	Tuesday, June 11th, 2024, at 2:00pm
<b>What is my intent?</b>	My intent is to address the issue of John not following through with scheduled meetings, to understand his perspective, and to work together to find a solution that ensures better adherence to meeting commitments in the future.
<b>What are the facts?</b>	<ol style="list-style-type: none"><li>1. John has missed three scheduled meetings in the past two weeks.</li><li>2. The meetings were planned to discuss critical project milestones and timelines.</li><li>3. John did not notify the team in advance about his inability to attend these meetings.</li><li>4. Follow-up attempts to reschedule or get updates from John were delayed by several days.</li></ol>
<b>What is the impact?</b>	<ol style="list-style-type: none"><li>1. <b>Delayed Progress:</b> The project timeline has been affected due to the lack of crucial updates and decisions that were supposed to be made during the missed meetings.</li><li>2. <b>Team Morale:</b> Other team members are feeling frustrated and demotivated due to the disruption in the workflow, and they need to repeatedly adjust their schedules.</li><li>3. <b>Project Relations:</b> The delay in the project milestones has led to dissatisfaction with project support in other departments, potentially harming our project reputation.</li><li>4. <b>Increased Workload:</b> The missed meetings have resulted in additional work for other team members who had to cover John's responsibilities to keep the project moving.</li></ol>

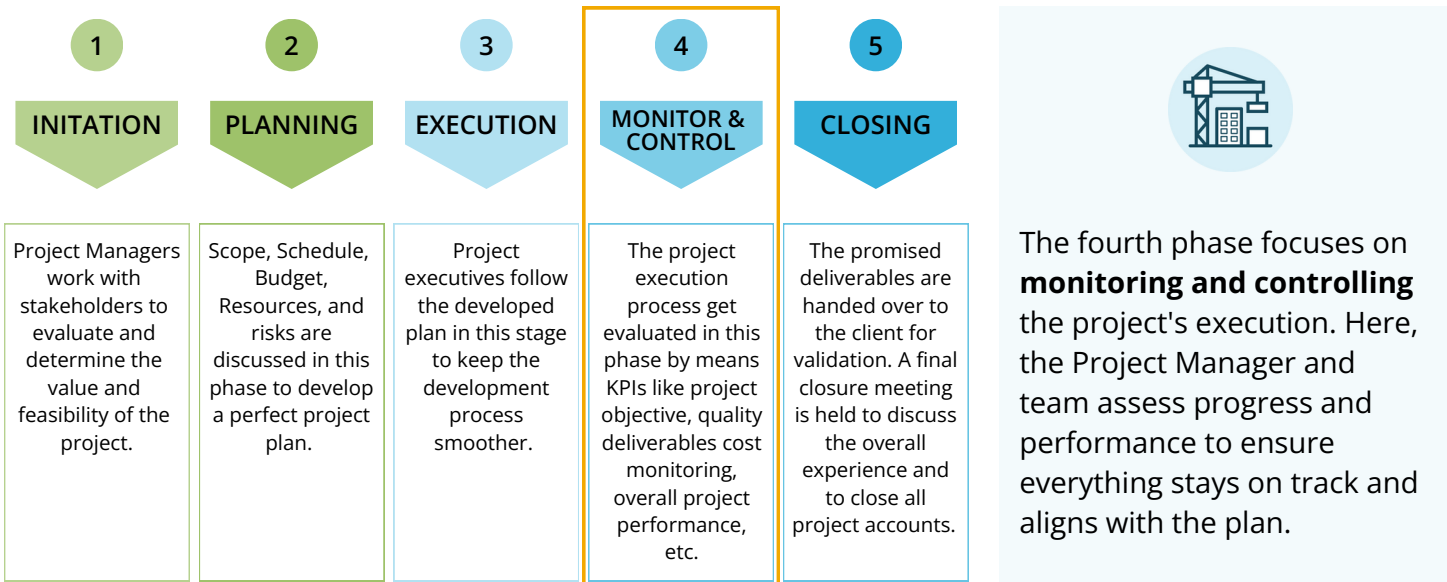
<b>Action items:</b>	<ol style="list-style-type: none"> <li>1. <b>Discuss Causes:</b> Understand John's reasons for missing the meetings to identify any underlying issues or challenges he may be facing.</li> <li>2. <b>Set Clear Expectations:</b> Reiterate the importance of attending scheduled meetings and the impact of missing them has on the team.</li> <li>3. <b>Agree on a Solution:</b> Collaborate with John to develop a plan that ensures he can attend future meetings or provide timely notice if he cannot.</li> <li>4. <b>Follow-Up:</b> Schedule regular check-ins to monitor progress and address any new issues promptly.</li> </ol>
<b>By when:</b>	<ol style="list-style-type: none"> <li>1. <b>Discuss Causes:</b> By the end of the meeting on July 11th.</li> <li>2. <b>Set Clear Expectations:</b> During the meeting on July 11th.</li> <li>3. <b>Agree on a Solution:</b> By July 19th.</li> <li>4. <b>Follow-Up:</b> Schedule first follow-up for July 26th, with bi-weekly check-ins thereafter.</li> </ol>

**TIP:** Remember to practice the **Four Foundational Behaviors** during this conversation:

1. **Demonstrate Respect:** Show empathy and integrity.
2. **Listen First:** Inspiration starts when you listen first, then talk later.
3. **Clarify Expectations:** Communicate how each person's role contributes to the whole.
4. **Practice Accountability:** Remind the team members that everyone's commitments are crucial for project success.

# Step 4: Monitor & Control

## Simplified Project Management Framework



The key tools used by Project Managers in the **Monitor & Control** stage are the:

- **Status Report:** Keeps the team accountable, communicates key indicators to sponsors, and helps prevent miscommunication; reports should be concise, audience-specific, and updated as needed.
- **Change Request:** Used for modifications affecting scope, budget, schedule, or deliverables.

*The Monitor and Control processes are about being proactive.* You should actively focus on reviewing the systems you've set up to help manage any changes that come up during a project.

### TIP:

Beware of project resistance. Like a town hall meeting, some will loudly oppose the change while others quietly resist. Either way, change is inevitable, so be ready to support stakeholders in adapting to whatever change a project may produce.



## SPECIALIZED SUPPORT

### Change Management

Need specialized support? Salt Lake City's Change Management Office provides project support in implementing change management techniques. Their work focuses on utilizing change management techniques in projects that impact employees whether it's new technology, new processes, or new structures. Project managers should seek support from the Change Management Office to increase adoption and change readiness, and build out communications and training plans.

Contact Leah Smith at [Leah.Smith@slc.gov](mailto:Leah.Smith@slc.gov)



# Status Report

Your project is underway, and now it's time to track its progress. A **status report** helps keep the team accountable and clearly communicates key indicators of project health to sponsors. While using a spreadsheet or Smartsheet is helpful, it's not required. Sending out status reports weekly helps prevent miscommunication. A well-crafted report should be concise and tailored to your audience: project team or sponsors. Modify the template as needed.

<b>Project Name</b>	Scheduling an Important Citywide Meeting
<b>Date</b>	June 19, 2024
<b>Project Manager</b>	Chris

**Current Status:** Yellow

**Green** = healthy or on target

**Yellow** = project isn't overdue, has at least one risk

**Red** = project is overdue or has multiple risks

<b>Attention Required: (as needed)</b>	NA
<b>Accomplishments:</b>	<ul style="list-style-type: none"><li>• Conference room is scheduled</li><li>• Technology has been double checked and we have all the correct cords and connections to the screen</li><li>• Coffee and bagels ordered</li></ul>
<b>Challenges: (as needed)</b>	<ul style="list-style-type: none"><li>• Phil's availability to attend meeting is still uncertain</li><li>• Quin's availability to attend meeting is still uncertain</li></ul>
<b>Updates &amp; Current Status:</b>	<ul style="list-style-type: none"><li>• 85% of meeting invitees have RSVP'd yes</li><li>• Agenda has been finalized</li></ul>
<b>New Commitments or Action Items:</b>	<p><b>Action Item:</b> Contact Phil via phone to confirm availability and address any concerns. <b>Responsible:</b> John <b>Due Date:</b> June 21, 2024</p> <p><b>Action Item:</b> Compile and distribute meeting minutes and action items post-meeting <b>Responsible:</b> Jane <b>Due Date:</b> July 12, 2024</p>
<b>Key Dates:</b> <i>Team out of office for a conference next week</i>	Project team is out of the office June 24-28, 2024, for a conference.

<p><b>Upcoming Milestones:</b></p>	<ul style="list-style-type: none"> <li>• <b>Milestone 1</b> -Meeting agenda, food, and room are on schedule- July 8, 2024</li> <li>• <b>Milestone 2</b>- Have not met 100% of meeting confirmation due to uncertainty of Phil and Quinn’s availability -delayed</li> </ul>
<p><b>Notes:</b></p>	<ul style="list-style-type: none"> <li>• The project is currently in a yellow status due to the uncertainty surrounding Phil and Quinn's participation. This is critical as their input is essential for finalizing the Q3 strategy.</li> <li>• All other preparations are on track, and the team is ready to proceed once Phil and Quinn’s availability are confirmed.</li> <li>• Regular updates will continue to ensure all stakeholders are informed of any changes or developments.</li> </ul>

**TIP:** Consider transferring or adapting these templates to Smartsheet, Excel, or another project management platform. Or use Word or a PDF like an OG.

# Change Request

Changes are a natural part of any project. Project **change requests** help evaluate proposed changes and helps you think through how you're going to handle that change. Use the **Change Request** form whenever a modification affects the scope, budget, schedule, or deliverables of a project. *Change requests should be sent to the Project Sponsor and Project Manager for review and approval. Any changes should be noted in the project charter.*

<b>Project Title</b>	Scheduling an Important Citywide Meeting
<b>Date</b>	July 1, 2024
<b>Request Made By</b>	Chris

Project Team				
Name	Title	Department	Role	Email
Chris	Senior Innovation Consultant	IMS	Project Manager	Chris@slc.gov
John	Senior Innovation Consultant	IMS	Project Support	John@slc.gov
Jane	Senior Innovation Consultant	IMS	Project Support	Jane@slc.gov

Steering Committee & Sponsor				
Name	Title	Department	Role	Email
Quinn	Mayor's Advisor	Mayor's Office	Executive Sponsor	Quinn@slc.gov

Key Stakeholders				
Name		Department or Division		
Phil	Planning & Design Division Director	Public Lands	Key Stakeholder	Phil@slc.gov
Shelley	Director Housing & Neighborhood Development	Community & Neighborhoods	Key Stakeholder	Shelley@slc.gov

<b>Proposed Project Change:</b>	Reschedule the meeting from <b>July 8, 2024, to July 19, 2024</b> , to accommodate Phil and Quinn's availability.
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<b>Reason for Change:</b>	Phil and Quinn have conflicts in their schedules for the day of the meeting and their participation is crucial for the meeting's objectives and overall success of the project.
<b>What Are the Consequences of Not Doing the Change?</b>	<ol style="list-style-type: none"> <li><b>Lack of Key Input:</b> Without Phil and Quinn's insights and approvals, critical decisions regarding the strategy may be incomplete or inaccurate.</li> <li><b>Project Delays:</b> The absence of a key decision-maker could lead to additional delays and the need for follow-up meetings, extending the project timeline further.</li> <li><b>Reduced Effectiveness:</b> The meeting may not be as productive, leading to missed opportunities for strategic alignment and planning.</li> </ol>
<b>What Alternatives Were Considered?</b>	<ol style="list-style-type: none"> <li><b>Proceeding Without Phil and Quinn:</b> This was deemed ineffective as her input is essential for strategic decisions.</li> <li><b>Conducting a Partial Meeting:</b> This option involves holding the meeting without Phil and Quinn and scheduling a follow-up, which could lead to fragmented discussions and delayed decisions.</li> <li><b>Virtual Participation:</b> Attempted to confirm Phil and Quinn's virtual attendance, but it was not feasible due to their current commitments.</li> </ol>
<b>How Will This Change Impact the Project?</b>	<ol style="list-style-type: none"> <li><b>Time (improvement or delay, total duration):</b> Delay the meeting by one week, potentially impacting downstream activities but ensures comprehensive discussions with all key stakeholders present.</li> <li><b>Scope (reference scope statement):</b> No change to the project scope; the change ensures the meeting's objectives are fully met.</li> <li><b>Resources (does your team have the capacity to pivot or take on new roles?):</b> The team has the capacity to accommodate the new meeting date without additional resources.</li> <li><b>Budget (savings or increase):</b> No significant impact on the budget; minor adjustments may be required for rescheduling logistics.</li> <li><b>Benefits (improved or diminished):</b> Improved benefit as all key stakeholders, including Jane, will be able to participate, leading to more informed and aligned decisions.</li> <li><b>Impact to other projects:</b> Minimal impact anticipated as the rescheduling is within a one-week timeframe and does not overlap with other major project deadlines.</li> </ol>

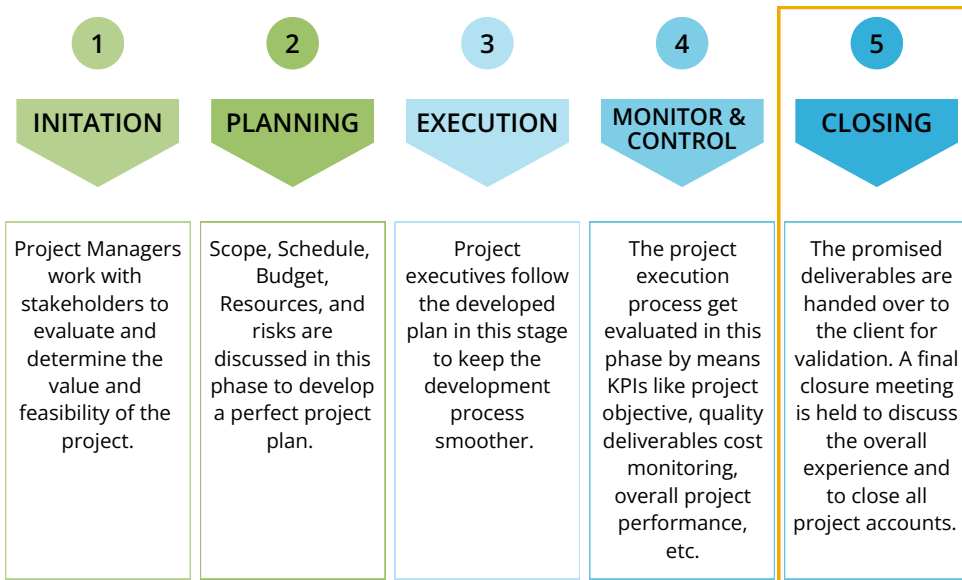
### Approval

Please review and approve the proposed change to ensure it aligns with project goals. Key Stakeholder(s)

<b>Name:</b> Chris <b>Date:</b> July 1, 2024 <b>Signature:</b> Chris	<b>Name:</b> Quinn <b>Date:</b> July 1, 2024 <b>Signature:</b> Quinn
--	--

# Step 5: Closing

## Simplified Project Management Framework



The **closing** phase begins once all deliverables are handed over to the stakeholder. After the client/customer validates & signs off on the project, the Project Manager conducts a final meeting with the team & stakeholders to review the experience & officially close the project.

## CELEBRATE YOUR SUCCESS!

**Recognize and celebrate your team's hard work throughout the project!** Mark key milestones to keep everyone engaged and energized. When the project wraps up, throw a party or showcase the achievements. Share your success story and highlight what was accomplished!

The key tools used by Project Managers in the **Closing** stage are the:

- **Lessons Learned:** Document the lessons learned during a project to highlight how challenges were handled and how to improve future efforts.
- **Project Close Checklist:** A guide to the project closure process.



### TEAM PARTY IDEAS

- **Spice Up Lunch:** Surprise your team with a food truck party! Choose a cool, trendy truck with delicious options and let everyone enjoy a gourmet lunch right outside the office. It's a tasty way to celebrate!
- **Epic Trivia & Team Challenges:** Set up an afternoon of thrilling trivia and epic team challenges. From wild board games to digital showdowns, turn the break into a competitive, high-energy blast that brings everyone together.
- **Rockstar Awards Ceremony:** Host a high-energy awards ceremony to celebrate your top project heroes. Give out fun and unique awards or certificates that highlight their standout contributions. Roll out the red carpet and let the applause roll!

# Lessons Learned

Document the **lessons learned** during a project to highlight how challenges were handled and how to improve future efforts.

<b>Project Name</b>	Scheduling an Important Citywide Meeting
<b>Date</b>	July 22, 2024
<b>Project Start Date</b>	June 3, 2024
<b>Project End Date</b>	July 19, 2024
<b>Project Manager</b>	Chris

Project Team				
Name	Title	Department or Division	Role	Email
Chris	Senior Innovation Consultant	IMS	Project Manager	Chris@slc.gov
John	Senior Innovation Consultant	IMS	Project Support	John@slc.gov
Jane	Senior Innovation Consultant	IMS	Project Support	Jane@slc.gov

Steering Committee & Sponsor				
Name	Title	Department or Division	Role	Email
Quinn	Mayor's Advisor	Mayor's Office	Executive Sponsor	Quinn@slc.gov

Key Stakeholders				
Name	Title	Department or Division	Role	Email
Phil	Planning & Design Division Director	Public Lands	Key Stakeholder	Phil@slc.gov
Shelley	Director Housing & Neighborhood Development	Community & Neighborhoods	Key Stakeholder	Shelley@slc.gov

<b>What went well?</b>		<b>Special Recognition</b>	
Scheduling meeting well in advance resulted in high attendance		For this meeting the Mayor's Office sent the calendar invite and this helped with high attendance rates	
<b>What could have been done better?</b>		<b>What should have been done differently?</b>	
Meeting attendees were very engaged and provided a lot of feedback and comments however it was hard for the notetaker to capture all the comments		For future meetings of this size consider having two notetakers	
<b>Next Steps / Action Items</b>		<b>Suggested Timeframe</b>	<b>Responsible Person</b>
1. Edit meeting notes for spelling and grammar errors	2 days after meeting	Jane	Edits made
1. Edit meeting notes for clarity	3 days after meeting	Jane	Edits made and approved by sponsor
1. Share summary of meeting and action steps with attendees	4-5 days after meeting	Chris	Summary and action steps drafted and reviewed by sponsor. Email sent to attendees.
1. Complete the Project Close Checklist	4-5 days after meeting	Chris	Form completed and saved in project folder.

# Project Close Checklist

How do you know when a project is truly finished? It's all about closing the loops. Below is a **checklist** to guide you through the project closure process. While not every item may apply to your project, reviewing each one ensures that everything is thoroughly wrapped up.

<b>Project name</b>	Scheduling an Important Citywide Meeting
<b>Prepared by</b>	Chris
<b>Date</b>	July 22, 2024

Done	Tasks Completed
Yes	Evaluate task list
Yes	Ensure there is a hand-off plan in place (who is managing the project, overseeing the software, handling changes)
Yes	Confirm fulfillment of project scope
Yes	Confirm fulfillment of all Project Change Requests
NA	Complete procurement closure
Yes	Document lessons learned
NA	Ensure end-users are ready to use by developing any necessary trainings
Yes	Submit final status report to key stakeholders
NA	Seek feedback from key stakeholders
Yes	Obtain all necessary signoffs (Sponsors may need to sign off on the project that it meets all desired results)
Yes	Decide where lessons learned, and project documents will be archived
NA	Measure success with data and surveys
NA	Archive project documents in compliance with the Recorder's Office
NA	Publish success
NA	Celebrate project close with rewards and recognition



# References

The templates in this toolkit are based on those from "**Project Management for the Unofficial Project Manager**" and have been adapted to meet Salt Lake City's specific project needs.

## ***Resources adapted from the following sources:***

- Kogon, K., Blakemore, S., & Wood, J. (2015). *Project management for the unofficial project manager*. Benbella Books.
- Larson, E. W., & Gray, C. F. (2017). *Project Management: The Managerial Process* (8th ed.). McGraw-Hill Education.
- OpenAI. (2024). *ChatGPT* (3.5). <https://chat.openai.com>
- Project Management Institute. (2023). PMI | Project Management Institute. Pmi.org. <https://www.pmi.org/>
- PMI. (2017). *A Guide to the Project Management Body of Knowledge* (6th ed.). Project Management Institute.

# Appendices

# Project Charter

<b>Project Name</b>	
<b>Date</b>	
<b>Project Start Date</b>	
<b>Project End Date</b>	
<b>Project Manager</b>	

<b>Project Team</b>				
<b>Name</b>	<b>Title</b>	<b>Department</b>	<b>Role</b>	<b>Email</b>

<b>Steering Committee &amp; Sponsor</b>				
<b>Name</b>	<b>Title</b>	<b>Department</b>	<b>Role</b>	<b>Email</b>

<b>Key Stakeholders</b>				
<b>Name</b>	<b>Title</b>	<b>Department or Division</b>	<b>Role</b>	<b>Email</b>

<p><b>Strategic Alignment:</b></p> <p><i>Which of the City's strategic objectives or Mayoral priorities does this project support?</i></p>	<ol style="list-style-type: none"> <li>1. <b>City Goals:</b> Does this project align with the Mayor's Priorities?</li> <li>2. <b>Master Plan:</b> Does the project align with a Master Plan?</li> <li>3. <b>City or State Ordinance</b></li> </ol>
<p><b>Project Purpose &amp; Description:</b></p> <p><i>Justify the project by listing the key reasons why this project should happen and provide a concise overview of the project.</i></p>	
<p><b>Scope Statement:</b></p> <p><i>Clearly define the project's boundaries, including what it will and won't address. Briefly list the criteria for successful completion. Keep this summary short.</i></p>	
<p><b>Goals:</b></p> <p><i>Provide a couple broad and general goals about what this project aims to accomplish. Goals are long-term and provide direction and purpose and are often qualitative.</i></p>	

---

**Objective:**

*Project objectives break down the steps needed to achieve those goals, they're specific and measurable. Provide a couple of SMART (specific, measurable, achievable, relevant and time-based) objectives.*

---

**High-Level Requirements:**

*These requirements guide the project's direction and ensure alignment with its objectives. More specific requirements can be identified in the planning process, right now identify the project requirements to be successful like user experience, equity, integration with other projects or initiatives, security, maintain and budget.*

---

**Risks:**

*What could go wrong or obstacles this project might face? Risks may or may not occur, but it's worth thinking about them and being ready to address them.*

---

<p><b>Opportunities:</b>  <i>Are there other projects and resources that could align and support this project?</i></p>	
<p><b>Project Governance:</b>  <i>Governance refers to the rules, procedures, and policies that guide how projects are managed, including the project's structure, the roles of those involved, and the decision-making process. Basically, who authorize this project so it can move forward? Who signs off on key milestones?</i></p>	
<p><b>Budget:</b>  <i>What is the estimated cost of the project?</i></p>	

**Summary Milestone Schedule:** *Outline important project milestones, include dates and how long each phase will take.*

Phase	Date	Milestone/Tasks

# Scope of Work

<b>Project Name</b>	
<b>Completed by</b>	
<b>Date</b>	
<b>Project Duration</b>	
<b>Project Manager</b>	

<b>Project Team</b>				
<b>Name</b>	<b>Title</b>	<b>Department</b>	<b>Role</b>	<b>Email</b>

<b>Key Stakeholders</b>				
<b>Name</b>	<b>Title</b>	<b>Department or Division</b>	<b>Role</b>	<b>Email</b>

---

**Executive  
Summary:**

*Provide a summary of the project's purpose, scope, and objectives. This summary should be the same summary you used for the project charter.*

---

**Success:**

*How will success be measured and what metrics will you use?*

---

**Deliverables:**

*Project deliverables are goods or services – tangible or intangible – produced by the project. These are what you will measure and use to assess your project's success. To determine deliverables, think about what this project will yield or produce. For example, a report, a document, software, a good, a service, etc.*



---

**Acceptance****Criteria:**

*Establish clear conditions that deliverables must meet for stakeholders and customers to approve them. They set the standards for when the final project is complete and ready, helping ensure the project meets client and constituent's expectations.*

---

**Exclusions:**

*List everything this project will not accomplish or include.*

---

**Constraints:**

*What could limit the project's success? Time, cost, scope, quality, and resources are all constraints to consider. You address how to work through these constraints in the "Assumptions and Constraints Template."*

---

**Assumptions:**

*List factors that you expect to happen during the project. Assumptions can be based on past experiences, City knowledge or an educated guess on events or circumstances that may impact the project. You address how to work through these assumptions in the "Assumptions and Constraints Template."*

---

**Definitions:**

*Define any key terms, roles or jargon that will need clarification so there won't be any confusion, and everyone understands and uses the correct term.*

# Resource Plan

<b>Project Name</b>	
<b>Date</b>	
<b>Project Start Date</b>	
<b>Project End Date</b>	
<b>Project Manager</b>	

<b>Resource (People or Items)</b>	<b>Task</b>	<b>Department</b>	<b>Planned Start</b>	<b>Planned End</b>	<b>Planned Hours</b>	<b>Cost</b>

# Key Sponsors & Stakeholder Management

<b>Project Name</b>	
<b>Completed by</b>	
<b>Version #</b>	
<b>Date Prepared</b>	

*Influence and Impact is measured in low, medium and high.*

<b>Name</b>	<b>Title</b>	<b>Department</b>	<b>Role in Project</b>	<b>Responsibilities</b>	<b>Influence</b>	<b>Impact</b>	<b>Email</b>

# Assumptions and Constraints

<b>Project Name</b>	
<b>Date</b>	
<b>Project Start Date</b>	
<b>Project End Date</b>	
<b>Project Manager</b>	

<b>Assumption</b>	<b>Result or Impact</b>
<b>Constraint</b>	<b>Mitigating Actions</b>

# Communication Plan

<b>Project Name</b>	
<b>Date</b>	
<b>Project Start Date</b>	
<b>Project End Date</b>	
<b>Project Manager</b>	

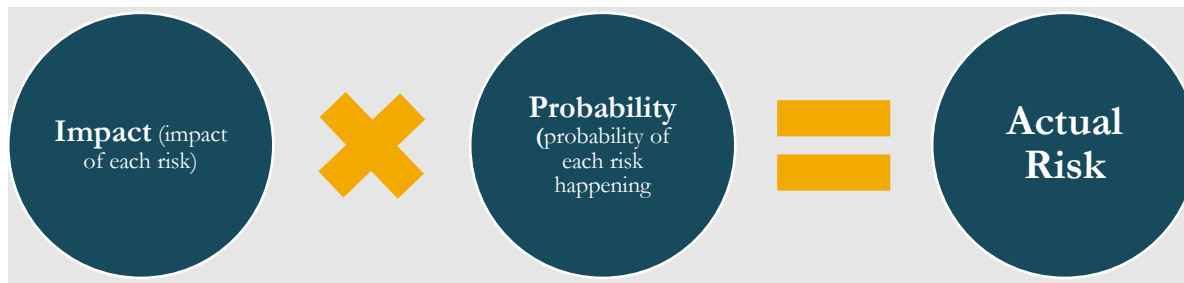
<b>Topic</b>	<b>Delivery Date</b>	<b>Audience</b>	<b>Key Message</b>	<b>Message Source</b>

# Risk Management

**Risk management** is a key part of project management. It involves reducing risks by anticipating them and communicating with stakeholders effectively. **Risks** are potential problems that could affect the project, while **issues** are problems that have already happened.

This assessment is subjective, while the scoring make you select the impact and likelihood of it happening. For risks that score 12 or higher, you will need to identify a strategy to reduce them in the Risk Management Plan.

## Risk Matrix



Impact Score	
5	Worst-case Scenario
4	Relatively Important Impact
2	Minimal Impact

Probability Score	
5	High Likelihood
3	Possible
1	Unlikely

#	Risk	Impact	Probability	Score I x P = R
1				
2				
3				

## Risk Management Plan

**Focus on high risks and plan on how you will address them.** To address risks, you may choose to:

- Transfer the risk: shift to a third party
- Accept the risk: acknowledge and deal with it if it occurs
- Mitigate the risk: reduce its probability or impact
- Eliminate the risk: do what you must to make it go away

Risk	Score	Strategy or Action	Who	Due Date



# Work Responsibility: RASCI CHART

A RASCI chart helps organize team tasks and clarifies who leads each task or deliverable.

<b>R = Responsible</b>	This person who will complete the task. Every task needs at least one <i>responsible</i> party, but it's okay to assign more.
<b>A = Accountable or Approver</b>	This person assigns the work and approves the deliverables before it's marked complete. Each task should ideally have one accountable person.
<b>S = Supportive</b>	The person or persons who will assist the responsible person with the activity.
<b>C = Consulted</b>	The person or persons who provide insight and direction into the activity. They will not do the actual work. Their input is based on their expertise in an area.
<b>I = Informed</b>	This person receives status updates, usually stakeholders who receive regular updates on the project.

Title of Process or Project:				
Task	Employee or Stakeholder Title	Employee or Stakeholder Title	Employee or Stakeholder Title	Employee or Stakeholder Title

# Schedule

<b>Project Name</b>	
<b>Completed by</b>	
<b>Version #</b>	
<b>Date Prepared</b>	

<b>WBS</b>	<b>Status</b>	<b>% Done</b>	<b>Deliverables or Tasks</b>	<b>Work Hours</b>	<b>Duration</b>	<b>Start Date</b>	<b>End Date</b>

# Project Kickoff Meeting Agenda

<b>Project Name</b>	
<b>Kickoff Date</b>	
<b>Project Start Date</b>	
<b>Project End Date</b>	
<b>Project Manager</b>	

Project Team		
Name	Role	Focus

Steering Committee & Sponsors				
Name	Title	Department	Role	Email

Key Stakeholders				
Name	Title	Department or Division	Role	Email

---

**Sponsor Message:**

*Provide a motivational message and an overview of the project to align the team and emphasize the project's importance.*

---

**Project Purpose & Description:**

*Provide a short summary on why this project is being pursued and its potential benefits to the City.*

---

**Scope:**

*Clearly define the project's boundaries, including what it will and won't address.*

---

**Timeline & Milestones:**

*Share a brief timeline include major milestones.*

---

---

**Known****Issues/Challenges**

*Briefly share a high level overview known challenges facing the project.*

---

**Project Governance**

*Governance refers to the rules, procedures, and policies that guide how projects are managed, including the project's structure, the roles of those involved, and the decision-making process. Basically, who authorize this project so it can move forward? Who signs off on key milestones?*

---

**Next Steps**

*What can everyone expect after this meeting concludes?*

---

# Team Accountability Session

---

<b>Project Name</b>	
<b>Date</b>	
<b>Project Start Date</b>	
<b>Project End Date</b>	
<b>Project Manager</b>	
<b>Attending</b>	

<b>Report on Last Week's Commitments</b>	
<b>New Commitments</b>	
<b>New Issues or Risks</b>	
<b>Other</b>	

# Conversation Planner

<b>Project Name</b>	
<b>Date</b>	
<b>Project Start Date</b>	
<b>Project End Date</b>	
<b>Project Manager</b>	

<b>With whom?</b>	
<b>When?</b>	

**What is my intent?**

**What are the facts?**

**What is the impact?**

**Action items:**

**By when:**



# Project Status Update

<b>Project Name</b>	
<b>Date</b>	
<b>Project Manager</b>	

## Current Status:

**Green** = healthy or on target

**Yellow** = project isn't overdue, has at least one risk

**Red** = project is overdue or has multiple risks

## Attention Required:

*(as needed)*

## Accomplishments:

## Challenges: *(as*

*needed)*

## Updates & Current Status:

<p><b>New Commitments or Action Items:</b></p>	<p><b>Action Item:</b>  <b>Responsible:</b>  <b>Due Date:</b></p> <p><b>Action Item:</b>  <b>Responsible:</b>  <b>Due Date:</b></p>
<p><b>Key Dates:</b>  <i>Team out of office for a conference next week</i></p>	
<p><b>Upcoming Milestones:</b></p>	
<p><b>Notes:</b></p>	

# Change Request

<b>Project Title</b>	
<b>Date</b>	
<b>Request Made By</b>	

<b>Project Team</b>				
<b>Name</b>	<b>Title</b>	<b>Department</b>	<b>Role</b>	<b>Email</b>

<b>Steering Committee &amp; Sponsor</b>				
<b>Name</b>	<b>Title</b>	<b>Department</b>	<b>Role</b>	<b>Email</b>

<b>Key Stakeholders</b>				
<b>Name</b>		<b>Department or Division</b>		

**Proposed Project  
Change:**

**Reason for  
Change:**

**What Are the  
Consequences of  
Not Doing the  
Change?**

**What Alternatives  
Were Considered?**

---

**How Will This  
Change Impact  
the Project?**

---

**Please review and approve the proposed change to ensure it aligns with project goals.**

**Key Stakeholder(s) Approval**

Name:

Date:

Signature:

Name:

Date:

Signature:

# Project Lessons Learned

<b>Project Name</b>	
<b>Date</b>	
<b>Project Start Date</b>	
<b>Project End Date</b>	
<b>Project Manager</b>	

<b>Project Team</b>				
<b>Name</b>	<b>Title</b>	<b>Department or Division</b>	<b>Role</b>	<b>Email</b>

<b>Steering Committee &amp; Sponsor</b>				
<b>Name</b>	<b>Title</b>	<b>Department or Division</b>	<b>Role</b>	<b>Email</b>

<b>Key Stakeholders</b>				
<b>Name</b>	<b>Title</b>	<b>Department or Division</b>	<b>Role</b>	<b>Email</b>

What went well?	Special Recognition
What could have been done better?	What should have been done differently?

# Project Close Checklist

<b>Project name</b>	
<b>Prepared by</b>	
<b>Date</b>	

<b>Done</b>	<b>Tasks Completed</b>



# CONTACT US

Have additional questions?  
Contact the the Innovation Team  
[Innovation@slc.gov](mailto:Innovation@slc.gov)

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