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EDUCATION
FUTURE WITHOUT BOUNDARIES™

CITE Conference 2021

I.T. Project Management

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SDCOE Enterprise Project Management Office (EP MO) | Nov. 17, 2021

HELL

O!

We are
Peyri & Reesa

- SDCOE
- Integrated Technology Services
- Enterprise Project Management Office (EPMO)

Hold up
some fingers
(0-10)!



HELL

O!

We are
Peyri & Reesa

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Examples of Projects We've Worked On in the EPMO:

Software Implementations

Software Development

Multi-Factor Authentication (MFA)

Vendor Product Assessments

Enterprise Resource Planning (ERP)

Website Redesign

Dashboards

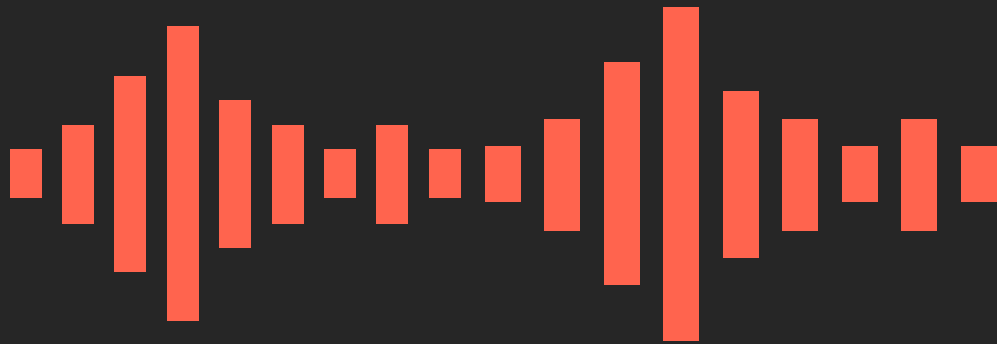
Training Programs

- SDCOE
- Integrated Technology Services
- Enterprise Project Management Office (EPMO)

Question...
Why do we all
do the projects
that we do?
What's the

Question...

What makes
projects NOT
easy?




*Message
from
the CIO...*

Our #1 Suggestion:

Take the time to consider
all the parts of your project
and write a **Project
Charter!**

What's in a project charter?



objectives tools
description
organization
deliverables
risks **scope** goals
schedule
success criteria
milestones

Our #2 Suggestion:

**Incorporate OCM
(Organizational Change
Management) strategies.**

OCM Strategies (from [PMI.org](https://www.pmi.org))

Sponsor Engagement

Active and visible participation; direct communication up, down and across the organization

- Part II (Identify Sponsor), Part III (Sponsor's Objectives)

Coaching & Org Transformation

Identify Change Agents in each department and collaborate with them to align their processes with the change

- Part II (Identify Advisory Team/Champions/Department Leads, School Site Leads)

Communication

Enterprise-wide, recurring communication using multiple channels

- Part II (Identify Communications Role), Part III Deliverables (Communications Plan) and Success Criteria, Part IV Schedule (build in when you will communicate)

Training

Build the requisite knowledge, skills, and abilities across the enterprise

- Part II (Identify Training Role), Part III Deliverables (Training Plan) and Success Criteria, Part IV Schedule (build in when you will provide training)

Resistance Management

Monitor department process change status and training and communication effectiveness

- Part III Risks (Monitor and mitigate risks)

Project Charter **DRAFT**

Project authorized by _____ on _____

I. Project Name

Project Name	Signature Software Implementation	Start Date	11/17/21	End Date	5/28/22
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II. Project Organization

Indicate all project team members and how frequently you will communicate with them.

<p>Project Manager <i>Oversees the project work plan; reports on status; leads project team that is responsible for achieving the project objectives</i></p> <p>Rachel Green - Project Manager</p>	<p>Sponsor <i>The top decision maker authorized to engage the project and fund it; has ultimate authority and responsibility for the project</i></p> <p>Janice Litman-Goralnik - CIO</p>
<p>Steering Committee <i>Key people that assist the project manager in making decisions and moving the project forward</i></p> <p><input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> As Needed</p> <p>Chandler Bing - Finance Mgr., Ross Geller - HR Mgr., Judy Geller - Principal</p>	<p>Stakeholders <i>An individual, group, or organization that may affect or be affected by outcome of the project</i></p> <p><input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input checked="" type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed</p> <p>All School District Staff School Site Leads and Dept. Leads</p>
<p>Project Team <i>Supports the project manager in performing work of the project to achieve its objectives</i></p> <p><input checked="" type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed</p> <p>Monica Geller - Governance, Joey Tribbiani - Testing, Phoebe Buffay - Support</p>	<p>Others Involved <i>List anyone else who will be involved and state their roles</i></p> <p><input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly <input checked="" type="checkbox"/> As Needed</p> <p>Gunther - Training, Emily Waltham - Champions Mr. Heckles - Communications</p>

III. Project Details

Project Description

Write a brief description of this project in simple, easy-to-understand terms. What are you trying to accomplish? Why?

Imagine a day when you can sign documents electronically from the comfort and safety of your own home without the need to go into the office. Imagine the system is easy to use, convenient, fast and secure. Visualize your documents being processed faster, more efficiently, and that you have visibility to where your documents are in the workflow. This project will implement the Signature Software solution across the school district.

Scope

Who/how many this will impact? What is included (or not included) that can help manage the expectations?

- Convert all of the forms into templates
- QA of forms by Project Team members
- UAT of forms by Form Owners and Power Users
- Training for Group Admins and Form Owners in how to manage their forms
- Training for end users in how to sign form using the Signature Software
- Integration with Outlook and Teams



Objectives/Success Criteria

How will you know if the project was a success? List what you are trying to accomplish and the success criteria.

- Reduce paper waste
- Reduce printing costs
- Improve accuracy and compliance
- Reduce time spent tracking form status
- Stakeholders will experience a smooth transition to using the Signature Software
- Stakeholders will report comfort with the new process
- Stakeholders will report they were well informed
- Stakeholders will report training met their needs and prepared them to use the product
- Stakeholders will report being able to sign documents on any device (cell phone, chrome book, etc.)

Goals Alignment

With which Board Goals and ITS Goals does this project align?

- #B1 Connect the educational experience to the world of work
- #B2 Provide educational opportunities and supports to SDCOE schools and school districts
- #B3 Become the leader and model for innovation
- #B4 Maximize human and operational resources to strengthen the organizational culture of SDCOE

- #ITS1 Maximize Customer Success
- #ITS2 Create Value
- #ITS3 Improve Division Efficiencies
- #ITS4 Protect•Detect•Respond

Deliverables

Which products or results do you expect upon completion of the project?

- 300 digitized forms with workflow
- Organization Change Management Plan
- Communication Plan
- Training Plan
- Testing Plan (QA and UAT)
- Support Plan
- Group Admins Plan
- Governance Plan



Risks

List the things that you think could be risks to the success of the project. If possible, list the mitigation strategy for each risk.

- **Risk:** Stakeholders may attempt to add more forms during the implementation
Mitigation: Identify a process to determine the level of effort required
- **Risk:** Resource constraints
Mitigation: Identify training, support and communications resources ahead of time
- **Risk:** Limited user adoption
Mitigation: Work with the stakeholders to identify realistic implementation levels



IV. Project Schedule & Milestones

Based on your needs, list either the phases and/or major milestones of the projects. Include start and end dates.

Phase/Major Milestone	Responsible (Lead)	Start Date or Month Begin	End Date or Month End
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			

Enter your project schedule here

Examples: Discovery, Requirements, Configuration, Dev, Testing, Communications, Training, Documentation, Go Live, Post Go Live Support/Handoffs, Closure



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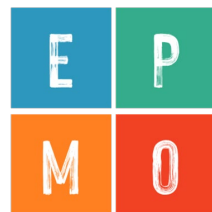
Question...

**What did you learn
today that will
make your
I.T. Projects easier?**



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Join us in June 2022!



K-12 Project Management Conference for I.T.

Email epmo@sdcoe.net to be added to the distribution list (Speakers and Attendees)