Which ITS charter/closeout template do I use?

<table>
<thead>
<tr>
<th>Small Project</th>
<th>Large Project (in ITS Project Inventory)</th>
</tr>
</thead>
<tbody>
<tr>
<td>• &lt;2 man months and within department and no capital funding</td>
<td>• &gt;2 man months or cross ITS/BC departments or requires capital funding</td>
</tr>
<tr>
<td>You may use the light version: Project Charter Light Project Closeout</td>
<td>You must use the full version: Project Charter Project Closeout</td>
</tr>
<tr>
<td>If requesting ITS NON-Infrastructure Capital funds, a Business Case is also required</td>
<td></td>
</tr>
</tbody>
</table>

**PROJECT MANAGEMENT QUICK REFERENCE**

**PROJECT** - a temporary endeavor undertaken to create a unique product, service or result.

**PROJECT MANAGEMENT** - is the discipline of planning, organizing, securing, and managing resources to achieve specific goals.

**PROJECT MANAGER** - is responsible for overseeing the stated project objectives are met. It is a role in a project, not a job title.

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**PROJECT LIFECYCLE**

<table>
<thead>
<tr>
<th>1 INITIATING</th>
<th>2 PLANNING</th>
<th>3 EXECUTING</th>
<th>4 CONTROLLING &amp; MONITORING</th>
<th>5 CLOSING</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ACTIVITY</strong></td>
<td><strong>ACTIVITY</strong></td>
<td><strong>ACTIVITY</strong></td>
<td><strong>ACTIVITY</strong></td>
<td><strong>ACTIVITY</strong></td>
</tr>
<tr>
<td>Define the Project WHAT and WHY</td>
<td>Define HOW the Project will be completed</td>
<td>EXECUTE the Plan Against the Schedule</td>
<td>TRACK Progress Against the Schedule</td>
<td>ACHIEVED Project Objectives</td>
</tr>
<tr>
<td>Outline the description of the project and its various key attributes.</td>
<td>Detail the activities, time, cost and resources needed to execute the plan.</td>
<td>Complete the work defined in the project schedule to accomplish the project’s requirements.</td>
<td>Control and monitor the execution of the plan and communicate status.</td>
<td></td>
</tr>
<tr>
<td>■ describe the project</td>
<td>■ define what is in and out of scope</td>
<td>■ coordinate people and resources</td>
<td>■ measure the ongoing project activities - “where are we versus where we should be”</td>
<td></td>
</tr>
<tr>
<td>■ detail the business needs</td>
<td>■ refine project approach and deliverables</td>
<td></td>
<td>■ monitor the project variables: cost, effort, scope</td>
<td></td>
</tr>
<tr>
<td>■ prepare preliminary scope statement</td>
<td>■ team selection</td>
<td>■ track/manage risk and change</td>
<td></td>
<td></td>
</tr>
<tr>
<td>■ prepare initial timeline</td>
<td>■ develop project schedule with detailed tasks and owners</td>
<td>• identify corrective actions to address issues “how can we get back on track again?”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>■ estimate costs (project and ongoing) and funding</td>
<td>■ detail budget</td>
<td>■ communicate status</td>
<td></td>
<td></td>
</tr>
<tr>
<td>■ define roles and responsibilities</td>
<td>■ plan for risk and change</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**COMMUNICATOR ARTIFACTS**

*Get templates:* [bc.edu/pmo](http://bc.edu/pmo)

**UPON APPROVAL**

- Project Charter
- Business Case
- Project Schedule
- Risk Plan
- Resource Plan
- Communication Plan
- Use of Planning Documents

** OBJECTIVE MET**

- Issues/Actions List
- Status Reports
- Meeting Agenda/Notes
- Project Closeout

**FILE NAMING TIPS**

Be consistent when you name files associated with a project. Use: `project name + description + date`

Example: `MyProject-KickoffAgenda-110101.doc`

**EMAIL SUBJECT LINE**

Use a similar approach in email. On the subject line, use: `project name + subject.`

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**TIPS**

- Predictability in terms of scope, schedule cost
- Efficient use of time and resources
- Improved communication
- Better control and reporting
- Management of change
- Management of risk
- Clear accountability
- Application of industry best practices
- Establishment of consistent repeated process

**LEARN MORE:** [www.pmi.org](http://www.pmi.org)