

## Appendix A

### Job Aids for Project Management

---

#### Table of Contents

Use the following list to access the job aid for the task you want to complete.

Job Aid Number	Title
<a href="#">JA – A.1</a>	Defining the Project Scope
<a href="#">JA – A.2</a>	Writing the Project Objective Statement
<a href="#">JA – A.3</a>	Creating a Project Schedule
<a href="#">JA – A.4</a>	Determining Roles and Responsibilities
<a href="#">JA – A.5</a>	Determining Project Constraints (Priority Matrix)
<a href="#">JA – A.6</a>	Creating the Risk Analysis and Contingency Plan
<a href="#">JA – A.7</a>	POAM Implementation Process

This page intentionally left blank

## JA – A.1: Defining the Project Scope

---

<b>Purpose</b>	<p>This is a job aid to help you define the deliverables and the evaluation criteria for each deliverable of the project. This job aid will also help determine the project sponsor, key stakeholders, and people who will be using the deliverables.</p> <p><i>Optional:</i> The project manager may also choose to develop a RACI Matrix, assigning responsibility for each deliverable, see <i>Appendix B, WS – B.1</i> for more information.</p>
<b>Who should use this JA</b>	<p>You should use this job aid if you are responsible for managing a resident training project. This may include: Coast Guard Performance Systems Branch managers, Instructional Systems Specialist Supervisors, and/or Project Leads.</p>
<b>When you should use this JA</b>	<p>Use this job aid <u>after</u> it has determined that a formal project management process is to be used. See Chapter 2 for greater instruction on whether formal Project management is necessary for any given project.</p>
<b>How to use this JA</b>	<p>Follow the steps as literally as is practical and in the sequence provided.</p>
<b>Worksheet</b>	<p>Use with <i>WS – B.1: POAM Template</i></p>

---

## JA – A.1: Defining the Project Scope, Continued

---

### Procedures

Step	Action
1	<p>Determine who decides the scope of your project using the following questions:</p> <ul style="list-style-type: none"> <li>• When my project is done, who will judge the success of it?</li> <li>• Who is giving my project resources (funding, people, accomplished performers, etc.)?</li> <li>• Who has made my project a priority?</li> <li>• Who stands to lose the most if my project fails?</li> </ul>
2	<p>Interview project sponsors/ stakeholders to define the following:</p> <ul style="list-style-type: none"> <li>• List each deliverable.</li> <li>• List evaluation criteria for each deliverable (examples include quality, template, metrics, timeframe, etc.)</li> <li>• Be as specific as possible. <i>Do not assume anything.</i> Document everything.</li> <li>• If some deliverables are discussed but later dropped, be sure to list these in your <b>What Is // What Is Not Included</b> table. Doing so reminds people that you will not be producing what they initially expected.</li> </ul>
3	<p>Draft and confirm the scope with sponsors and stakeholders.</p> <p><i>Example:</i></p> <ul style="list-style-type: none"> <li>• <i>Email your draft scope section to the sponsors/stakeholders requesting a response confirming accuracy.</i></li> <li>• <i>Revise any deliverables per feedback.</i></li> <li>• <i>Include the revised scope definition in your POAM.</i></li> </ul> <p><i>*The scope will be formally approved once the POAM is approved and signed off.</i></p>

---

## JA – A.2: Writing the Project Objective Statement

---

**Purpose** This is a job aid to help you describe in 28 words or less *what* the project will produce (deliverables), by *when* (schedule), with *what* resources (money/people/tools). Much like performance objectives, it helps keep all stakeholders on task towards the ultimate goal.

---

**Who should use this JA** You should use this job aid if you are responsible for managing a resident training project. This may include: Coast Guard Performance Systems Branch managers, Instructional Systems Specialist Supervisors, and/or Project Leads.

---

**When you should use this JA** Use this job aid after the project scope has been approved but before you have started the project schedule.

---

**How to use this JA** Follow the steps as literally as is practical and in the sequence provided.

---

**Worksheet** Use with *WS-B.1: POAM Template*

---

## JA – A.2: Writing the Project Objective Statement, Continued

---

### Procedures

Step	Action
1	Gather data. <ul style="list-style-type: none"> <li>• The Project Manager confirms the preliminary project expectations regarding schedule, scope, and resources with critical project sponsors (e.g., the leader is funding the project, steering committee members).</li> </ul>
2	Validate the draft POS. <ul style="list-style-type: none"> <li>• The Project Manager partners with the core project team to write a draft POS.</li> <li>• A strong POS utilizes the following standards:               <ul style="list-style-type: none"> <li>✓ Starts with a verb</li> <li>✓ Is 28 words or less</li> <li>✓ States what will be produced by when with what resources</li> <li>✓ Does not use jargon or acronyms</li> <li>✓ Should highlight the project's most critical aspect (e.g., deadline or budget cap)</li> </ul> </li> </ul>
3	Circulate the draft POS to project sponsors for feedback.
4	Secure approval of the POS. <ul style="list-style-type: none"> <li>• The Project Manager includes the revised POS in the POAM</li> <li>• Final approval of the POS when the POAM is approved at the Project Sponsor level</li> </ul>
5	Include approved POS in the POAM

---

## JA – A.3: Creating a Project Schedule

---

<b>Purpose</b>	This is a job aid to help you create a project schedule. The project schedule is used to clarify <i>what</i> will be achieved by <i>when</i> and with <i>whom</i> . A project schedule includes both deadlines and milestones.
<b>Who should use this JA</b>	You should use this job aid if you are responsible for managing a resident training project. This may include: Coast Guard Performance Systems Branch managers, Instructional Systems Specialist Supervisors, and/or Project Leads.
<b>When you should use this JA</b>	Use this job aid <u>after</u> it has determined that a formal project management process is to be used and <u>after</u> the project scope has been approved
<b>How to use this JA</b>	Follow the steps as literally as is practical and in the sequence provided.
<b>Worksheet</b>	Use with <i>WS-B.1: POAM Template</i>

---

## JA – A.3: Creating a Project Schedule, Continued

---

### Procedure

Step	Action
1	Discuss and review the following items with your team members: <ul style="list-style-type: none"> <li>• Project Objective Statement and Project Scope</li> <li>• Phases or categories of work (Analysis, Design, etc.)</li> </ul>
2	Identify all tasks: <ul style="list-style-type: none"> <li>• Agree on major phases/sub-phases of the project.</li> <li>• Organize the tasks under the phases/sub phases.               <ul style="list-style-type: none"> <li>○ Before doing this activity, it helps to study how long similar projects took (task durations) in the past.</li> </ul> </li> </ul>
3	Assign task criteria: <ul style="list-style-type: none"> <li>• Identify a deliverable (or output) for each task and specify the acceptance criteria (standard of performance).</li> <li>• Identify one owner for each task. The owner is responsible for the task completion and its criteria, though others on the team can assist in task completion as well.</li> <li>• Estimate the duration of each task.</li> </ul>
4	Estimate the amount of time / target completion date for each milestone. <p><i><b>Note:</b> Reference the Design Ratio Guidelines within the text of Chapter 2 (Determining the Project Schedule) to assist in allotting an appropriate amount of time for each phase.</i></p>
5	Document the milestone (phase) dates in your POAM.
6	Update the schedule (task durations, completion) per inputs / time dedicated or allotted to each phase and tasks to complete in each phase. <ul style="list-style-type: none"> <li>• Use this to continue to create your detailed schedule for each task necessary for each deliverable and milestone.</li> </ul>

**RESULT:** A schedule reflecting the path to project completion.

---

## JA – A.4: Determining Roles and Responsibilities

---

<b>Purpose</b>	This is a job aid to help you write the Roles and Responsibilities section of your POAM and to clarify exactly <i>who</i> is responsible for <i>what</i> in your project. This job aid will also help you list the names of everyone who will play an important role in the project, along with key responsibilities within that role.
<b>Who should use this JA</b>	You should use this job aid if you are responsible for managing a resident training project. This may include: Coast Guard Performance Systems Branch managers, Instructional Systems Specialist Supervisors, and/or Project Leads.
<b>When you should use this JA</b>	Use this job aid <u>after</u> it has determined that a formal project management process is to be used and <u>after</u> the project scope has been approved
<b>How to use this JA</b>	Follow the steps as literally as is practical and in the sequence provided.
<b>Worksheet</b>	Use with <i>WS-B.1: POAM Template</i>

---

## JA – A.4: Determining Roles and Responsibilities, Continued

---

### Procedures

Step	Action
1	Review the summary descriptions of some key project roles. <ul style="list-style-type: none"> <li>• <i>Using the table on the next page.</i></li> </ul>
2	Determine which roles apply to your project.
3	Determine which roles are not listed in the table, but need to exist for your project.
4	Write a description of each role not defined.
5	Review your list of roles with your project sponsor(s) and management to confirm your understanding of the roles unique to your project.
6	Include your roles and responsibilities table in your POAM.

**Note:** *Some people are considered “core members” of the project. For example, the instructional designers represent “core” team members.*

*Others are considered “extended members” of the project. Extended members help only at certain times. For example, you might use a graphic artist during development, but not during analysis. The graphic artist is an extended team member.*

*Core team members should be involved in every aspect of the project. Extended team members only need to be kept informed of the issues directly impacting them as a resource (e.g., hours of work needed that week).*

*Use the table on the next page to help identify and define roles and responsibilities, you may want to indicate your core team members with an asterisk (\*) on the POAM.*

## JA – A.4: Determining Roles and Responsibilities, Continued

### Key Roles Defined

Use the role description table below to determine which roles are relevant to your project.

ROLE	DESCRIPTION
Project manager	Responsible for POAM creation/approval, overall project management, strategic communications, providing whatever the project team needs to deliver against POAM expectations, and setting priorities
Project lead	<i>(This role is sometimes the same person as the project manager.)</i> Responsible for tracking the progress of a project, overseeing change management, scheduling updates, and providing tactical communications and conflict resolution.
Executive sponsor	<i>(one person – typically the senior member)</i> Responsible for funding the project, confirming the project manager, ranking the priority of the project, ensuring continued resources, and offering strategic guidance.
Sponsor(s) / stakeholder(s)	<i>(People who have a stake in the success of the project; could include the group that the project will impact the greatest.)</i> Responsible for providing strategic guidance, setting priorities and ensuring resources are available.
Steering committee (optional)	<i>(Usually comprised of no more than eight people representing Project Leadership and Sponsors; however, not every project will have this role.)</i> Responsible for supporting the Project Manager by helping to facilitate strategic decisions and drive key support (funding, resources).
Instructional designers	Responsible for driving the analysis, design, development, implementation, and evaluation of the course development process.
Subject Matter Specialists (SMS)	Responsible for providing the technical integrity and oversight of the course, and consultation throughout the course development process.
Accomplished performers (ap)	<i>(People who are top performers with relevant field experience, which represents the target (primary) audience.)</i> Responsible for providing real world perspective and the audience voice.

This page intentionally left blank

## JA – A.5: Determining Project Constraints (Priority Matrix)

---

### Purpose

This is a job aid to help you determine your constraints and priorities. The Constraints (Priority) Matrix is one part of the Assumptions and Constraints section of your POAM. Assumptions and constraints in the POAM highlight the things you assume to be true going into the project (the assumptions), and the things that everyone knows will present challenges during the project (constraints).

The Priority Matrix is used to help you rank the schedule, scope, and resources so that the highest quality product is delivered. Additionally, if someone comes to you during the project with a change to one of these three areas, you can refer to the Matrix to determine a response and impact assessment.

### Who should use this JA

You should use this job aid if you are responsible for managing a resident training project. This may include: Coast Guard Performance Systems Branch managers, Instructional Systems Specialist Supervisors, and/or Project Leads.

### When you should use this JA

Use this job aid after it has determined that a formal project management process is to be used and after the project scope has been approved.

### How to use this JA

Follow the steps as literally as is practical and in the sequence provided.

### Worksheet

Use with *WS-B.1: POAM Template*

---

## JA – A.5: Determining Project Constraints (Priority Matrix), Continued

### Procedures

Using the table provided in your POAM template (see *Appendix B*) follow these steps:

Step	Action
1	<p>Determine the priority for each area, ensuring that each column only has one “X”.</p> <p>In other words, you must determine which area (scope, schedule, or resources) is Most Constrained, which is Somewhat Constrained, and which is the Least.</p>
2	<p>After Priority is determined, capture why you defined each as you did...using the language as in the template:</p> <ul style="list-style-type: none"> <li>• <b>xxxxx</b> is <i>most constrained</i> because ...</li> <li>• <b>xxxxxx</b> is <i>somewhat constrained</i> because ...</li> <li>• <b>xxxxxxx</b> are <i>least constrained</i> ...</li> </ul>
3	<p>Include your Priority Matrix to the POAM.</p>

## **JA – A.6: Creating the Risk Analysis and Contingency Plan**

---

<b>Purpose</b>	This is a job aid to help you create a risk analysis and contingency plan. The purpose of completing this job aid is to increase your awareness of what might derail your project, and to offer a solution to mitigate any negative impact should this event occur.
<b>Who should use this JA</b>	You should use this job aid if you are responsible for managing a resident training project. This may include: Coast Guard Performance Systems Branch managers, Instructional Systems Specialist Supervisors, and/or Project Leads.
<b>When you should use this JA</b>	Use this job aid <u>after</u> it has determined that a formal project management process is to be used and <u>after</u> the project scope has been approved
<b>How to use this JA</b>	Follow the steps as literally as is practical and in the sequence provided.
<b>Worksheet</b>	Use with <i>WS-B.1: POAM Template</i>

---

## JA – A.6: Creating the Risk Analysis and Contingency Plan, Continued

### Procedures

Follow these steps to analyze the risk and create a contingency plan:

Step	Action
1	Recognize the difference between <i>Preventive Action</i> and <i>Contingency Plan</i> .
2	<p>Meet with your team to identify known risks and predictable risks. Use the following questions as a guide for the discussion:</p> <ul style="list-style-type: none"> <li>• <i>What went wrong with a similar project? Can we talk to that Project Manager and/or team to find out?</i></li> <li>• <i>Are there are trends in the environment (e.g., new technologies, mergers, cost reductions, etc.) that could negatively impact the project?</i></li> <li>• <i>Are the scope, schedule, and resources subject to change? How solid are these aspects at project launch? What could be possible obstacles?</i></li> </ul>
3	Narrow this list down to the top five to six most predictable events that could occur that would impact your project.
4	<p>Set aside the risks that didn't make "the cut" for future reference.</p> <ul style="list-style-type: none"> <li>• When you create the POAM, you may be able to reference these lesser known risks in the <i>Assumptions List</i> (see the <b>Error! Reference source not found.</b> section) or the <i>What Will Not Be Included</i> table (see the <b>Error! Reference source not found.</b> section).</li> </ul>
5	<p>For each risk, identify and document the following:</p> <ul style="list-style-type: none"> <li>• Likelihood of risk occurring (<i>high/medium/low</i>)</li> <li>• Potential negative impact to project (<i>high/medium/low</i>)</li> <li>• Difficulty of timely detection (<i>high/medium/low</i>)</li> <li>• Overall risk level based on the previous bullets (<i>high/medium/low</i>)</li> </ul>
6	Meet with your project sponsors to communicate the risk analysis data from the previous step, making adjustments for additional insight and input they may have.

## JA – A.6: Creating the Risk Analysis and Contingency Plan, Continued

---

### Procedures, Continued

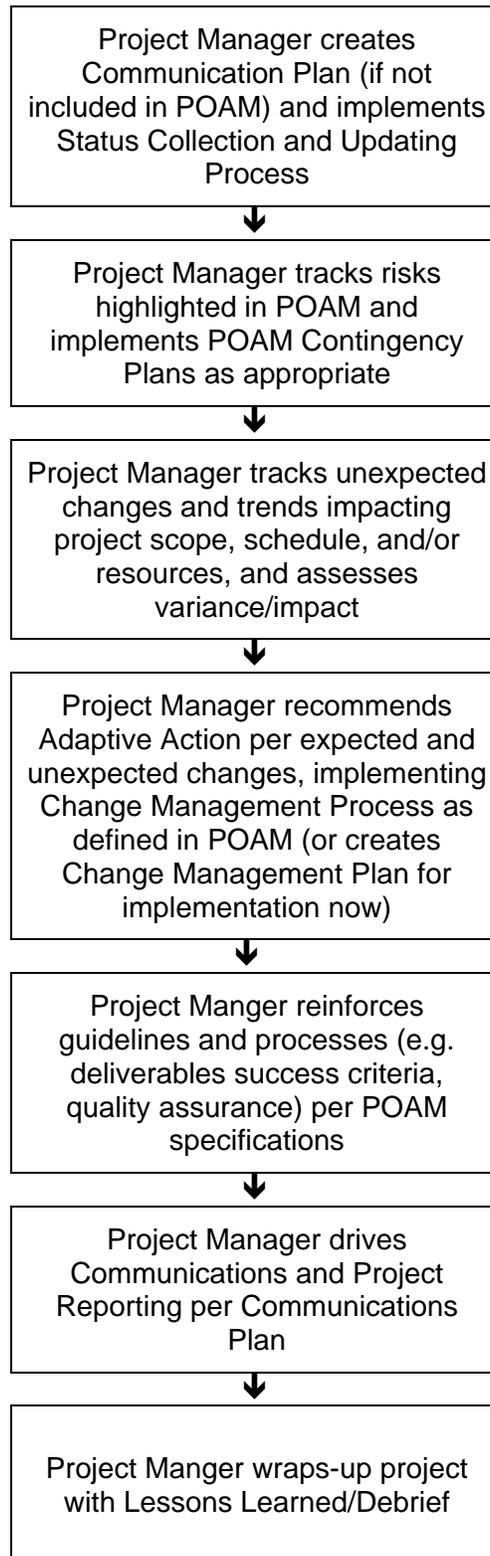
Step	Action
7	Create a contingency plan for each major risk considering the data provided by the project sponsors and team and the following criteria: <ul style="list-style-type: none"> <li>• <b>Trigger:</b> <i>What is the trigger for this risk? What observation might indicate the risk will happen?</i></li> <li>• <b>Owner:</b> <i>Who will own the trigger for each risk?</i></li> <li>• <b>Preventive Action:</b> <i>What could we do today to possibly prevent this risk from happening in the future?</i></li> </ul>
8	Assign a “strong” performer to own the highest risks that could harm project most.
9	Share all risk analysis data and contingency plans with your team and project sponsor(s) to obtain consensus for the course of action. <p style="text-align: center;"><i>Example: If there is a risk that Subject Matter Specialists may be deployed during Needs Analysis, factor the time for Contingency Planning into your schedule “just in case”.</i></p>
10	Include a <i>Risk Analysis</i> table and Contingency Plan table in your POAM.
11	Integrate the preventive actions and the contingency plan into your schedule as appropriate.

---

This page intentionally left blank

## JA – A.7: POAM Implementation Process

---



This page intentionally left blank