

APPENDIX B

Worksheets for Project Management

Table of Contents

These worksheets are designed work in concert with the Project Management Job Aids presented in *Appendix A*. There is not a one-to-one relationship since not all jobs need a standard way of capturing the associated data.

The following worksheets have been provided to you for managing and tracking projects.

Worksheet Number	Title
WS – B.1	POAM Template
WS – B.2.A	Project Schedule Template (Example 1)
WS – B.2.B	Project Schedule Template (Example 2)
WS – B.3	Meeting Template

Worksheet Access

Samples of the worksheets are included in this appendix. Refer to the *SOP Downloads (Word Version)* page on TRACEN Petaluma's internet website for the most recent and usable copies of all Worksheets and Templates:

<http://www.uscg.mil/hq/cg1/TracenPetaluma/SOP/default.asp>

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WS – B.1: POAM Template

Instructions

Create a POAM that contains the nine elements discussed in Chapter 2. One such template is shown on the following pages, you can use this from which you delete and modify the content to fit your local procedures.

Job Aid, JA-A.5, provides additional guidance on completion of the Risk Analysis and Contingency Plan sections.



Course Name
Plan of Action and Milestones (POAM)
Executive Summary
 DD Month Year

1. Summary of EPQs:

(if not an EPQ/RPQ driven course, then discuss task list, etc)

2. Project Plan and Timelines:

As per the following POAM, below is an explanation of the major milestones of the project with an estimated project completion date of Month Year.

- **Analysis** – Estimated completion date: Month Year
- **Course Design** – Estimated completion date: Month Year
- **Development** – Estimated completion date: Month Year
- **Implementation** – Estimated completion date: Month Year

3. Anticipated capability and resource constraints:

(Communicate early about parameters/constraints to project, including resourcing and funding needs)

WS – B.1: POAM Template, Continued



Project: Course Name

Project Objective Statement:

Project Scope:

Deliverable	Success Criteria
	•
	•
	•
	•

What is included	What is not included
•	•

WS – B.1: POAM Template, Continued

Project Schedule

Task	Start Date (Actual)	End Date (Actual)	Status	POC (Point of Contact)	Comments
ANALYSIS – MILESTONE					
DESIGN – MILESTONE					
DEVELOPMENT - MILESTONE					
IMPLEMENTATION - MILESTONE					

WS – B.1: POAM Template, Continued

Roles and Responsibilities:

Project Manager: *Name, GS
 Project Lead: * Name, GS
 Project Team Members (Developers): * Name (s)

Key Stakeholders	
(Name	Position
*CDR Name (TO)	Executive Sponsor
*LCDR Name	Branch Chief
*ITCM Name	School Chief
*ITCS Name	Asst School Chief
* Name	Quality Assurance
*ITC Name	Primary CG POC
LT Name	Supervisor, IST
Name	Contractor Supervisor

Resource Requirements:

People –

Project Deliverable	Skills Required to Produce Deliverable	Individual(s) with Ideal Skill Set	Estimated Duration	Estimated Date
	•			
	•			
	•			

Budget –

Additional Comments:

WS – B.1: POAM Template, Continued

Project Assumptions:

The following assumptions were presented and approved at the DD MON YEAR kick-off meeting:

-

Project Constraints:

Area	Priority		
	Most Constrained	Somewhat Constrained	Least Constrained
Schedule			
Scope			
Resources			

- xxxxx is *most constrained* because ...
- xxxxxx is *somewhat constrained* because ...
- xxxxxx are *least constrained* ...

WS – B.1: POAM Template, Continued

Risk Assessment / Contingency Plan:

Identified Risk	Potential Impact	Likelihood of Occurrence	Difficulty of Timely Detection	Overall Risk*

Identified Risk	Preventive Action	Contingency Action	Trigger	Owner

Quality Assurance:

Quality Assurance Strategy	Responsible

WS – B.1: POAM Template, Continued

RACI

This is optional. If you choose to use this process, it would be presented in the POAM (as shown on this last page) as a table with information tied to the deliverables identified in “Project Scope.”

This is not always done –often dependant on the size of the team – many times captured within your project schedule. The list below is provided as additional guidance on what RACI stands for:

- **RESPONSIBLE:** The people responsible for the deliverable (or task).
- **ACCOUNTABLE:** The ONE person ultimately responsible for the deliverable (or task completion).
- **CONSULTED:** The people who might be consulted about the deliverable (or task) but who do not perform any development work.
- **INFORMED:** The people who need to be kept updated on progress; typically this is one-way communication (e.g., informing project sponsors of project status).

RACI Matrix – Who is responsible, accountable, consulted and informed?

Responsible:	Accountable:	Consulted:	Informed:

Change Management:

Change Order Process

-

Version Control Process

-

Project Documentation Process

-

POAM SIGNATURE (APPROVAL) AND DATE

Title	Signature	Date
Training Officer		
Project Manager		
Project Leader		
School Chief		
School Sponsor		
Project Sponsor		

WS – B.2.A: Project Schedule Template (Example 1)

Instructions

Using the Job Aid, *JA-A.3: Creating a Work Breakdown Structure*, collect all information necessary to create your project schedule, examples of which may look like those shown on the following pages.

PHASE / MILESTONE DATE

- Course Analysis (DATE):
- Course Design (DATE):
- Development (DATE):
- Implementation (DATE):

Status as of (DATE)		Project: (TITLE)				
POC: (NAME)		Primary Audience: (RATING/SCHOOL)				
Task Description	Start Date (Actual)	End Date (Actual)	Status	POC	Comments	
ANALYSIS						
DESIGN						
DEVELOPMENT						
IMPLEMENTATION						

WS – B.2.B: Project Schedule Template (Example 2)

XX Resident Course Production						
Plan of Action and Milestones (POAM)						
Development Team & Primary POC's			<i>SMS Name</i>			
Project / Course Type: (A-School or C-School)			A-School			
Target Completion Date			DD MON YYYY			
1.0	EPQ Alignment					
<i>From 1.2</i>	EPQ's (if applicable)	Total # EPQ's	# NEW	# Changed	# Unchanged	Comments
Task No.	Task Description	Start Date	Target Completion (Due Date)	Completion Status / Tracking	Milestone Actually Completed	Comments
1.1	New/Revised EPQ's signed & received					<i>Date Signed</i>
1.2	Determine EPQ Changes					<i>(captured above)</i>
1.3	EPQ's reviewed against current References					
1.4	Developer / Resource assigned to implement changes					<i>Indicate that person in POC block on top of this POAM</i>
2.0	Tasking Memo					
2.1	Tasking Letter received from CG-132					<i>Date Received</i>
2.2	POAM & Cover Memo to TO for response to CG-132					<i>Communicates expected timeline to Program / RFMC to gain agreement</i>
3.0	TPO / EO Development					
3.1	Task List created from EPQ's and approved					
3.2	TPO's Written or Revised					
3.3	EO's Written or Revised					

WS – B.2.B: Project Schedule Template (Example 2), Continued

<u>XX Resident Course Production</u> <u>Plan of Action and Milestones (POAM)</u>						
4.0 Curriculum Outline Developed / Updated						
Task No.	Task Description	Start Date	Target Completion (Due Date)	Completion Status / Tracking	Milestone Actually Completed	Comments
4.1	Curriculum Outline Drafted					<i>Can start as soon as TPO's are written</i>
4.2	Completion of Curriculum Outline					<i>After Validation testing (11.1)</i>
4.3	Curriculum Outline Routed					
4.4	Curriculum Outline sent to CG-132					<i>Will not be done until update is complete, validation testing finalized</i>
4.5	Curriculum Outline signed by CG-132					<i>Date we received copy of signed CO</i>
5.0 Instructional Materials Updated/Revised						
5.0	Performance Tests Created or Updated					<i>one PT per Task</i>
5.1	Lessons (IG's) Created or Revised					
5.2	<i>Task 5.2: N/A for Resident Development</i>					
5.3	Job Aids Created or Revised					
5.4	Materials to AP's for review					
5.5	Student Materials (SG's) created or revised					
5.6	Other:					

WS – B.2.B: Project Schedule Template (Example 2), Continued

XX Resident Course Production						
Plan of Action and Milestones (POAM)						
11.0 Implementation of Resident Courses <i>(Note: Tasks 6.0 – 10.0 apply to Non-Resident Development)</i>						
Task No.	Task Description	Start Date	Target Completion (Due Date)	Completion Status / Tracking	Milestone Actually Completed	Comments
11.1	Validation of Course					<i>CO completed after validation (4.2)</i>
11.2	Course Materials Updated as a result of Validation					
11.3	Hand-off of new Course Materials to School for Implementation					
11.4	Scheduled delivery of new course					

End

WS – B.3: Meeting Template

Applicability This template can be used and modified for use for your Alignment / Kick-off meeting, status meetings, or any other throughout the duration of your project.

	Project: (NAME)		(DATE)
	Project Objective: (STATE)		
Project Manager xyz	Project Lead xyz		
Key Stakeholders			
	Executive Sponsor		Primary CG POC
	Branch Chief		Supervisor, IST
	School Chief		Contract Mgr.
	Asst School Chief		Contract Team Lead
	Quality Assurance		Project Team Members, Developers
Agenda			
<i>TOPIC</i>	<i>NAME</i>	<i>TIME</i>	
TRENDS			
NEXT STEPS			