

# PROJECT CONCEPT FORM



*<NOTE TO AUTHOR: The blue italicized text throughout this template is provided solely as background information or examples to assist the author in creating this document. Please delete all such text, as well as the instructions in each section, prior to submitting this document. ONLY YOUR PROJECT-SPECIFIC INFORMATION SHOULD APPEAR IN THE FINAL VERSION. For more information about the use of this form, refer to Metro's Construction Project Management Guide.>*

*<NOTE ABOUT TYPING IN THIS FORM: Depending on your computer settings, you may find you have to grab and drag your mouse at the bottom of a row to expand the row for typing. This may be because your Table Option is not set to "resize to fit contents". That table setting that can be accessed by right clicking in the table, choosing "Table Properties" , "Options" and then checking the "Automatically resize to fit contents" box.>*

<b>Project Title</b>	<i>&lt;Pick a good name and stick with it through the life of your project.&gt;</i>		
<b>Project Sponsor</b>	<i>&lt;Who wants this project completed and is invested in project oversight?&gt;</i>	<b>Metro Facility or Department</b>	<i>&lt;Department&gt;</i>
<b>Proposed Project Manager</b>	<i>&lt;Indicate the Metro staff or external consultant who you suggest should manage this project.&gt;</i>		
<b>Type</b>	<i>&lt;Renewal &amp; Replacement or Capital or, if other, describe&gt;</i>	<b>Proposed start date</b>	<i>&lt;mm/yy&gt;</i>

## SCOPE

<b>Business purpose of this project:</b>
<i>&lt;Identify the business problem or opportunity this project is going to address. Describe how this project will address this business need.&gt;</i>
<b>Project scope statement:</b>
<i>&lt; Describe the objective(s) of this project.&gt;</i>
<b>Specific exclusions from scope:</b>
<i>&lt; Agreeing on what will not be included in the project can help prevent scope creep later on.&gt;</i>
<b>Project deliverables and key milestones:</b>
<i>&lt; List and describe the primary deliverables of this project, and the dates for when you plan to accomplish these&gt;</i> 1. <i>&lt;e.g., final design documents completed, March 15th, 2013&gt;</i> 2. 3.
<b>Stakeholders</b>
<i>&lt;Who will influence, affect or be affected by the project, as known to date?&gt;</i>

# PROJECT CONCEPT FORM



## COST

<b>What is the estimated cost of this project?</b>	<i>&lt;\$ Costs <u>do not</u> include METRO / MERC staff time.&gt;</i>	
<b>What is the estimated cost of staff time dedicated to this project?</b>	<i>&lt;complete this section if you are required to track the cost of METRO / MERC staff time, for example, because of funding source&gt;</i>	
<b>What materials or services are included in this estimate?</b>		
<i>&lt; Briefly describe what procurements are needed&gt;</i>		
<b>How did you arrive at this estimate?</b>		
<i>&lt; Describe how estimate was created. For example, you are estimating from a similar project, you have a preliminary bid, you have a predefined inflexible budget.&gt;</i>		
<b>Between what percentage range do you think your estimate is accurate?</b>	<i>&lt;%&gt; % &amp; &lt;%&gt; %</i>	
<b>Budget year(s) / Funding source(s):</b>	<i>&lt;e.g. FY 13-14 \$25,000 Fund 010 &amp; \$30,000 Fund 611&gt;</i>	

## STAFF RESOURCES

<b>Who else will be working or providing input on this project?</b>	
<i>&lt; list the names of who will be working on the project&gt;</i>	
<b>What is the estimate of total staff hours?</b>	<i>&lt; # of total estimated hours including Project Manager&gt;</i>
<b>Can current staffing accommodate project?</b>	<i>&lt;YES/ NO&gt; If no, how will you mitigate labor shortage, e.g. overtime, consultant)</i>

## SCHEDULE

<b>What is anticipated start date?</b>	<i>&lt;mm/dd/yy&gt;</i>	<b>anticipated end date?</b>	<i>&lt;mm/dd/yy&gt;</i>
<b>What is the project duration in weeks</b>	<i>&lt;# of weeks&gt;</i>		

## CONSTRAINTS / ASSUMPTIONS

<b>What constraints will impact or assumptions shape this project?</b>
<i>&lt; list and describe&gt;</i>
1. <i>&lt;e.g., constrained by fixed R &amp; R budget of only \$x,xxx&gt;</i>
2. <i>&lt;e.g., assume Metro will assign construction manager to manage project&gt;</i>
3. <i>&lt;e.g., constrained by short duration to complete between theater events&gt;</i>

## RISKS

<b>What key risks will you have to assess, plan for and monitor on this project?</b>
<i>&lt; list and describe&gt;</i>
1. <i>&lt;e.g., delays could cause unfinished construction at site on opening night&gt;</i>
2.
3.

# PROJECT CONCEPT FORM



## FORM PROCESS FLOW

For Capital Project requests:

**Department Director** signs form indicating approval for project to proceed to Capital Planning review.

Forward a copy of the signed form to Project Sponsor and Capital Planning Coordinator.

For Renewal and Replacement requests:

**Department Director** signs form indicating approval for project to proceed to Renewal and Replacement review.

Forward a copy of the signed form to Project Sponsor and Capital Planning Coordinator.

## APPROVED BY

Title / Name	Signature	Date

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# Project Management Plan

<Name of project here>

<Version #.#>

<date created>

Please record revisions to your Project Plan document in the table below.

Version Number	Brief Description of Change	Author(s)	Date
1.0			

Your project is approved. Now you need to plan your project. This **Project Management Plan** template guides you through planning your project’s scope, budget, schedule, quality, risks, communications and change management process. Your Project Management Plan sets the **baseline** for measuring quality and progress, and is intended as your day to day management tool.

In several areas, this template provides some standard language which you can edit to fit your project, but ***it is important to remember that the level of detail included in the Project Management Plan should be customized to fit the needs of your project.*** For example, a project with a short duration and high quality standards may have minimal communication requirements but extensive quality management requirements. If you need to pay close attention to a particular management area, you may wish to create a separate detailed plan for that area, and simply reference that plan in the Project Management Plan document. Alternatively, if your project is simple to construct and requires little coordination among contractors and staff, you may address only a few of the management areas in the plan template, and write “not applicable” in others.

***For most projects one summary plan is sufficient, with your approach for each management area summarized in a few sentences. The cPMO is available to consult in the development of the Project Management Plan, and will check the reasonableness of your plan once developed.***

Since construction projects typically occur in phases, you will need to update the Project Plan as necessary to reflect key adjustments as your project progresses.

Note: The instructions and explanations in *blue italics*, and the examples are to assist you in drafting the document. Please remove these instructions as you fill in your pertinent information. Some of the examples can be modified to fit your project.

Please contact the cPMO for questions or assistance.

# 1. SCOPE MANAGEMENT

## Project Purpose

The purpose of the <name of the project> is to  
 <Include in this section things that might help the team to better understand the project. Some of the items that might be included are:

*Background that led to the formation of this project*

*Alternatives considered*

*Overall summary as to the purpose of this project>*

Example: The project will replace a heating system that is twenty years old. The new heating system will use geothermal pumps. Although conventional heating pumps were considered, we are piloting the geothermal technology for energy savings and pollution reduction benefits.

## Project Goals

<Provide a summary of the goals of this project. What does this project intend to accomplish and deliver?>

Example:

- Furthers sustainability of Metro facilities and equipment through replacement of replacement of heating system.
- Pilots new, sustainable technology that can be a model for energy savings and pollution reduction.
- Enhances partnerships as Energy Trust of Oregon provided partial funding for project.

## Project Milestones

<Milestones are significant events within the project schedule. Describe the major milestones of this project against which major progress will be assessed.>

Example:

Deliverable or event	Milestone Date
1. Project Management Plan is Approved	mm-dd-yyyy
2. Design firm selected	mm-dd-yyyy
3. 100% Design Documents completed; design meeting with team	mm-dd-yyyy

Deliverable or event	Milestone Date
4. Bid tendered for construction	mm-dd-yyyy
5. Construction contract signed by all parties	mm-dd-yyyy
6. All permitting approved	mm-dd-yyyy
7. Ground breaking at site	mm-dd-yyyy
8. Building shell and core complete	mm-dd-yyyy
9. Notice of substantial completion issued	mm-dd-yyyy
10. Space is ready for the grand opening celebration / ribbon cutting	mm-dd-yyyy
11. Space is occupied (or equipment activated)	mm-dd-yyyy
12. Punch list items completed	mm-dd-yyyy

### Scope and Requirements

*<Describe the work that needs to be completed to deliver the project. Describe any specific design, material, or other requirements that must be met.>*

Example: The dock must be removable for winter storage.

### Scope Exclusions

*<List any specific elements not included in the project scope.>*

Example: The exhibit will not include customized covers for winter. If needed, they will have to be purchased separately.

### Assumptions and Constraints

*<Provide a list of assumptions and constraints upon which the project is based. Assumptions are presumptions that the project plan is relying on to be true and constraints are the limitations such as budget or schedule under which the project will be conducted.>*

Examples:

(Assumption): The geology of the surrounding area is similar to where geothermal heat pumps have been successfully installed in the past.

(Constraint): Customer will only accept Metro Paint.

### Acceptance Criteria

*<Describe how you will know the product of the project is acceptable. **At minimum, document who formally accepts the product.**>*

Example: The final product of this project is a monkey exhibit which will be formally accepted by the Zoo's Director of Living Exhibits.

## Scope Management

*<Describe the approach to be taken to monitor and control changes to the Scope or Requirements. Also describe who is responsible for signing-off on deliverables such as design documents and change orders, and approves sending the notice of completion.>*

Example: The scope and requirements of the project are defined in the Project Management Plan. Acceptance of this Project Management Plan by the Project Sponsor and Steering Committee gives approval to the Project Manager to proceed.

As design develops, each design phase will be approved by the Facilities Director, the Operations Director, the Project Sponsor and the Project Manager.

Any changes to the project scope or requirements that arise during design or construction must be submitted or communicated to the Project Manager. Any scope changes recommended by the Project Manager will be administered through the Change Management Process outlined in Section 12.

## Work Breakdown Structure

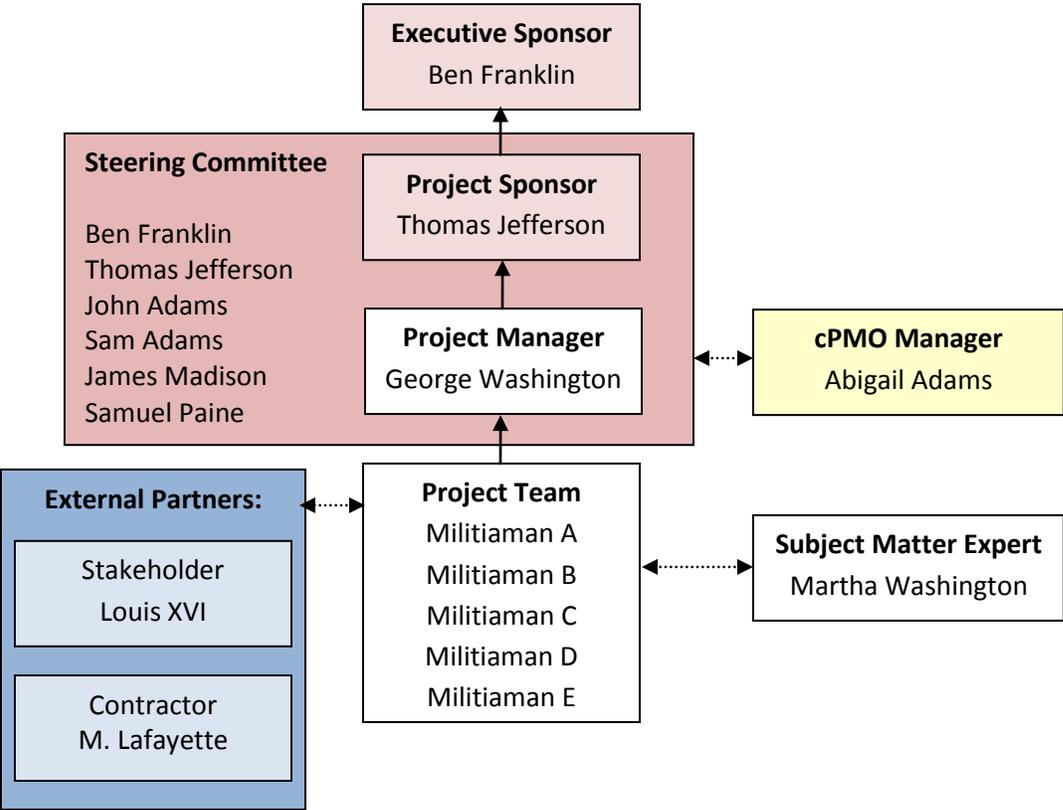
*<Insert or attach your work breakdown structure. Generally, a work breakdown structure is necessary to determine significant level milestones and to create a project schedule.>*

## 2. PROJECT ORGANIZATION AND GOVERNANCE

### Project Organizational Structure

<Insert a diagram of the organizational structure of the project team, including contractors and other stakeholders who could influence the outcome of the project. You can also insert and edit the word shapes below.>

Example:



## Project Responsibilities

*<Identify all the people who will participate in or support the project. Be sure to include external vendors, citizen committees or other groups that require management. Identify the role, name (or primary contact if a group) and general responsibility in the project.>*

Example:

<b>Roles / Name</b>	<b>Responsibilities</b>
<b>Project Manager</b> <Name>	<ul style="list-style-type: none"> <li>• Develop the Project Management and subsidiary plans with the team</li> <li>• Manage project according to the Project Plans</li> <li>• Manage the team's performance of project tasks</li> <li>• Responsible for project status reporting, risk management, escalation of issues that cannot be resolved within the team</li> <li>• Secure acceptance and approval of deliverables</li> <li>• Ensure the project is delivered within budget, on schedule, and within scope</li> </ul>
<b>Project Sponsor</b> <Name>	<ul style="list-style-type: none"> <li>• Encourage stakeholder involvement and building and maintaining their ongoing commitment</li> <li>• Report on project progress to those responsible at a high level, such as agency leadership as needed</li> <li>• Make key project decisions and remove obstacles as necessary</li> <li>• Assist the project when required by exerting their organizational authority and ability to influence</li> </ul>
<b>Executive Sponsor</b> <Name>	<ul style="list-style-type: none"> <li>• Be supportive of the project</li> <li>• Be prepared to report on the project and its progress to Senior Leadership</li> <li>• Represent the project at an Executive level when required by exerting organizational authority and ability to influence</li> <li>• Advise the Project Sponsor of any changes in business direction or policy which may have an effect on the project</li> </ul>
<b>Metro staff subject experts</b> <Name(s)>	<ul style="list-style-type: none"> <li>• Provide subject matter expertise</li> <li>• Define or assist in project requirements</li> </ul>
<b>Project Steering Committee</b> <Name(s)>	<ul style="list-style-type: none"> <li>• Foster positive communication outside of the team regarding the project's progress and outcomes</li> <li>• Monitor project performance</li> <li>• Resolve conflicts between stakeholder groups</li> <li>• Encourage stakeholder involvement</li> <li>• Build and maintain commitment for project</li> </ul>
<b>Customer</b> <Name(s)>	<ul style="list-style-type: none"> <li>• Signs-off (accepts) deliverables and finished product.</li> <li>• At Metro, most likely is the Executive or Project Sponsor.</li> </ul>
<b>cPMO Manager</b> <Name>	<ul style="list-style-type: none"> <li>• Reviews Project Management Plan.</li> <li>• Identifies project resources as needed.</li> </ul>

### 3. SCHEDULE MANAGEMENT

#### Project Schedule

*<Insert or attach your schedule to this project plan document.>*

*If your project is very simple, you can update this table to show the start and finish dates of your project's work components. Most likely however, your schedule will be derived from your work breakdown structure which decomposes project deliverables into smaller work packages. Your project milestones should align with the target end date of major deliverables.>*

Example:

#	Deliverables	Target Start Date	Target End Date
1	<b>Project Management Plan</b> is developed; reviewed by project team and approved by Sponsor and Steering Committee	mm-dd-yyyy	mm-dd-yyyy
2	<b>Design scope of work</b> for RFP is developed approved by Project Sponsor and Customer	mm-dd-yyyy	mm-dd-yyyy
3	<b>Contract for design</b> is drafted and executed	mm-dd-yyyy	mm-dd-yyyy
4	<b>Biddable construction documents</b> are drafted and finalized	mm-dd-yyyy	mm-dd-yyyy

#### Schedule Control

*<Describe what tool you will use to manage your project's schedule>*

*<Describe the approach you will take to track progress against the planned schedule. For example, how often and with whom will you review the schedule?>*

Example:

The schedule will be managed in Microsoft Project. A copy of the baseline schedule is attached to project plan document.

The schedule will be reviewed at weekly team meetings. The project manager will update the project schedule with current information weekly to reflect the work needed to complete the project. The updated project schedule will then be compared to the Schedule Baseline to determine if there are any schedule problems or risks. The Project Manager will determine if corrective actions are necessary to address schedule variances. The Project

Manager will communicate corrective actions and/or schedule risks to the Project Sponsor, Project Steering Committee and the cPMO Manager. Any schedule changes recommended by the Project Manager will be administered through the Change Management Process outlined in section 12.

Additionally, at the conclusion of each project phase, schedule review meetings will be conducted to confirm the schedule for the following phase. For example, when the design phase is completed, the schedule for the construction phase will be reviewed with the project team to re-confirm the construction schedule.

## 4. BUDGET / COST MANAGEMENT

### Project Budget

*<Provide a breakdown of purchases, contracts or IGAs for this project, any agreed upon links to deliverables, and when invoices for these purchases/services are expected. Also include any special restrictions on funds or timing of expenditures.>*

Example:

Budget item	Expected Invoice Date	Total
Contract A – 50% Design	mm-dd-yy	\$2,000.00
Contract A – 100% Design	mm-dd-yy	\$2,000.00
Contract B – Engineering Study	mm-dd-yy	\$1,500.00
Miscellaneous - permit fee*	mm-dd-yy	\$850.00
<b>Total Budget / Cost</b>		<b>\$6,350.00</b>

\*Permitting fee to be paid out of general fund. All other funds from fund xxx.

### Budget and Cost Control

*<Describe what tool you will use to manage your project's budget.>*

*<Describe the how often you will track spending against the payment schedule.>*

*<Describe the approach you will take to monitor costs throughout project execution.>*

Examples: The Project Manager will track the budget in Excel against the budget baseline that was initially established in Project Concept. The Project Manager will conduct a budget

check-in at 50% design to ensure construction costs are still within budget. Any anticipated cost changes that result from final design will be discussed will be administered through the Change Control Process.

During construction, change order requests will be carefully reviewed to ensure the work requested is really necessary and not already covered in the contract. Any anticipated cost changes that result during construction will be administered through the Change Management Process outlined in section 12.

Change requests that impact work in progress will be given high priority to mitigate possible claims for delay.

## 5. QUALITY MANAGEMENT

*<Describe the quality criteria or standards that are to be used for determining whether the deliverables are complete and correct. Also, describe the quality assurance process that the team will follow to assure that the quality criteria are being met.>*

### Examples:

All work must be permitted and approved by building inspectors under applicable rules and regulations in the City of Portland.

The design firm will provide an architect to oversee construction and be available for questions.

The contractor will provide submittals for approval. Submittals will be issued on an agreed upon format. The Project Manager will track submittals on a submittal log. The Project Manager will reviewed the log daily to ensure any reviews requiring special expertise are scheduled with the appropriate reviewer.

Construction drawings will be updated to reflect agreed upon as-built changes.

## 6. SAFETY MANAGEMENT

*<Describe how safety standards will be followed and monitored. Address any unusual or extreme conditions that require special management.>*

Example:

Contract documents will include language to hold contractors responsible for a Safety Management Plan and to conform to generally accepted construction safety standards. Project management staff will make periodic inspections and inform the contractor of any safety concerns that need to be addressed.

## 7. RESOURCE MANAGEMENT

*<List or describe any special schedule expectations or restrictions for staff, equipment or site, and your plan to ensure that resources are available when needed.>*

Example: This project will require a twenty foot diameter tunnel-boring-machine that will be leased from the City of Portland for six months. We plan to sign an IGA with the City that specifies the use of this equipment between April 2013 and November 2013. The equipment will be stored at the construction site.

## 8. COMMUNICATION MANAGEMENT

*<Describe reports to be generated and meetings to be organized including the timing, frequency, and the methods. **You must at least include your plan for Project Status Reporting.**>*

Example:

Description	Frequency	Method	Audience	Owner
Project Team Work Meetings	Weekly	Meeting	Project Team	Project Manager
Project Status Reports <b>REQUIRED!</b>	Biweekly	Written report	Project Team, Steering Committee, cPMO, Stakeholders	Project Manager
Steering Committee Updates Meetings	Monthly	Meeting	Project Steering Committee	Project Manager
Agency wide Project	Monthly	COO email	All staff	Project

Information Messages		Newsletter		Manager
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## 9. RISK MANAGEMENT

*<Describe the approach you will take to monitor risks throughout the project.>*

*<Also include a list of risks identified to date, as assessment of the probability of occurring and impact, your response strategy, and mitigation costs is applicable.>*

**Example:** The project team will take the following approach in managing project risks:

At the beginning of the project, the project team and the stakeholders will discuss potential risks of the project and develop an exhaustive risk list. All these identified risks will then be ranked using the scale of high, medium, and low on their probability of actually happening and, on their impact on the project's objectives.

Any risks that are determined to have a high to medium probability of happening and a high to medium impact on the project will be addressed through a risk response strategy. The risk will be assigned an owner.

The project manager will continually monitor all identified risks and evaluate new risks to ensure that they are managed successfully, and remove risks that can no longer occur.

The project manager, the project team and the key stakeholders will also meet monthly to reevaluate risks and evaluate any new risks identified.

<b>Key to High, Medium and Low (H/M/L) ranking:</b>	
<b><u>Probability</u></b>	<b><u>Impact</u></b>
<b>High:</b> This happened recently. This always happens to some extent with these projects.	<b>High:</b> If this happens budget and/or schedule and/or scope will have to be adjusted. This risk will cost us money to mitigate.
<b>Medium:</b> This happened once before. Other project managers tell me to be on guard for this happening.	<b>Medium:</b> If this happens we'll have to adjust the schedule, but can probably recover fairly quickly. Costs should be minimal.
<b>Low:</b> This could possibly happen and we want to keep the risk on the watch list.	<b>Low:</b> This will not cause us to adjust budget, schedule or scope, but we would need to exert some extra effort to mitigate.

Example:

Risk	Probability (H/M/L)	Impact (H/M/L)	Mitigation Strategy	Owner
<b>RISKS TO ACTIVELY MANAGE:</b>				
1. This project needs to utilize park staff during the summer months when their workloads are heavy and unpredictable.	M	M	1a. Agree on team commitment prior to project kickoff working through department management.  1b. Use Outlook to schedule a series of meetings with staff at project kickoff.  1c. Alternate meetings at different park venues to fairly distribute travel time.	1a. Project Manager  1b. Team member A  1c. Team member A
2. The tunnel borer may need special maintenance if we tunnel into sludge.	M	H	2a. Contract with a tunnel-borer mechanic to provide on-site service if necessary. Add potential cost of \$2,500 to contingency reserves. (5 service calls at \$500 per call).	2a. Project Manager
<b>RISKS ON WATCH LIST:</b>				
Risk	Probability (H/M/L)	Impact (H/M/L)	Mitigation Strategy	Owner
1. Project Manager may be assigned to another project	L	M	n/a	n/a
2. The part we want to use has a four-week turn around and could sell out if we get a snow storm.	L	L	n/a	n/a

## 10. ISSUES MANAGEMENT

*<Describe the approach to track, manage and resolve issues of the project. An example issue log can be found in the appendix of Metro's **Construction Project Management Guide**.>*

Example: All project issues will be tracked using the project's Issues Log which is an Excel spreadsheet. Issues will be described, assigned an owner and target date for resolution.

Open issue review will be an agenda item at each project team meeting.

## 11. PROCUREMENT AND CONTRACT MANAGEMENT

*<Describe the type of procurement (s) you will use for your project and who will support the administration of these contracts.>*

Example: The project will use a design-bid-build process and will follow Metro procurement policies.

Since the design and construction work will each be less than \$50,000, an informal RFB process will be used. Per Metro procurement policies, MWESB solicitation requirements apply.

*<Procurement Services Staff Name>* will support the procurement process.

*<Administrative Staff Name>* will support the drafting of procurement documents and the tracking of expenditures against the contract.

## 12. CHANGE MANAGEMENT

*<Describe the approach to be taken to manage change requests and maintain accurate and reliable baselines to reflect the changes.>*

Example: This project will follow a change management process as follows.

The scope, schedule and budget approved in this Project Management Plan will be considered the baseline. The Project Manager will monitor schedule and budget, and take corrective actions to prevent changes to the schedule or budget baselines. Similarly, scope or requirements change requests will be evaluated to ensure the change is valid and necessary.

If the Project Manager believes a project change is necessary, the Project Manager will evaluate the impact of the change on the project, and prepare a Project Change Request Form. Once the Change Request is approved, the Scope, Schedule or Cost baseline will be updated in Project Management Plan and other relevant tracking tools.

### 13. DOCUMENT MANAGEMENT

*<Describe where you will store both electronic and hard copy project documents. See Appendix D of the Construction Management Guide for some tips on document management >*

Example: All electronic project documents will be stored on the M Drive. Drawings and other physical documents will be stored in a locked file cabinet in *<location.>*

Document version control will follow the protocol:

- Version number
- Brief description of change
- Author
- Date of version

### 14. CLOSE-OUT AND TRANSITION PLANNING

*<Describe the plan for project close-out and transition>*

Example:

**Lessons learned:** At the end of the project, the Project Manager will set up Lessons Learned Meetings with the Project Stakeholders and Team Members, and will document what worked well and not well so as to inform future projects.

**Transition project to operations:** When the Project Manager obtains the Certificate of Occupancy the building will transfer to operating staff. The Project Manager and Operations manager will meet at least monthly during the warranty period to discuss building, equipment or operational concerns regarding the project.

# PROJECT STATUS REPORT



<Version 1>

<Date>

<Project Title>

Project Manager

<name>

Project Sponsor

<name>

<b>Status Legend</b> To color status row, click in cell, choose design: shading, and select color.	
	<b>ON TRACK.</b> Moving along nicely, no significant concerns at this time.
	<b>CAUTION.</b> Must be addressed or may be escalated to off-track mode. Project Manager has implemented corrective action.
	<b>OFF TRACK.</b> Causing significant impact to the project. Project manager needs assistance from Sponsor or others to correct.

## SCHEDULE

<Describe overall project schedule and describe any issues.>

## BUDGET /COST

<Describe overall project cost status and describe any issues.>

## SCOPE / DELIVERABLES

<Describe overall deliverable status and describe any issues.>

**SCHEDULE VARIANCE**

START DATE		COMPLETION DATE	
BASELINE	REVISED	BASELINE	REVISED
<i>mm/dd/yy</i>	<i>mm/dd/yy</i>	<i>mm/dd/yy</i>	<i>mm/dd/yy</i>

**BUDGET / COST VARIANCE**

BUDGET BASELINE	COSTS TO DATE OF THIS REPORT	ESTIMATE AT COMPLETION	BUDGET VARIANCE
<i>\$xx,xxx</i>	<i>\$xx,xxx</i>	<i>\$xx,xxx</i>	<i>\$x</i>

**CRITICAL ISSUES OR VARIANCES NEEDING CORRECTIVE ACTION**

ISSUE AND PROJECT IMPACT	CORRECTIVE ACTION	ASSIGNED TO	ANTICIPATED RESOLUTION DATE
<i>&lt;Insert text here&gt;</i>			

**ACCOMPLISHMENT SINCE LAST STATUS REPORT**

*<List accomplishments you want to communicate. Order by what makes most sense for your project: e.g., phases, deliverables, goals>*

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- 
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- 
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# PROJECT CHANGE REQUEST FORM



*<NOTE TO AUTHOR: The blue italicized text throughout this template is provided solely as background information or examples to assist the author in creating this document. Please delete all such text, as well as the instructions in each section, prior to submitting this document. ONLY YOUR PROJECT-SPECIFIC INFORMATION SHOULD APPEAR IN THE FINAL VERSION. For more information about the use of this form, refer to Metro’s Construction Project Management Guide.>*

<b>Project Name</b>	<i>&lt;insert text here&gt;</i>	<b>Project #</b>	<i>&lt;PeopleSoft code&gt;</i>
<b>Project Manager</b>	<i>&lt;insert text here&gt;</i>	<b>Request Date</b>	<i>&lt;mm/dd/yy&gt;</i>

## SUMMARY

<p><i>&lt;Summarize the changes for this request. Right click in the appropriate Major or Minor Type box, select properties, and select DEFAULT VALUE “checked”&gt;</i></p>
---

## DETAIL DESCRIPTION

<p><i>&lt;For each area of <u>scope</u>, <u>schedule</u>, <u>budget</u>, and/or <u>resources</u>, describe the change requested.&gt;</i></p>
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# PROJECT CHANGE REQUEST FORM



## CAUSE AND IMPACT

<b>Justification</b>	<i>&lt;Summarize why this change is necessary&gt;</i>
<b>Cause</b>	<i>&lt;Summarize what caused this change&gt;</i>
<b>Impact if not implemented</b>	<i>&lt;Summarize what happens to project if no change is implemented&gt;</i>
<b>Alternatives</b>	<i>&lt;Summarize any alternatives considered&gt;</i>
<b>Risk</b>	<i>&lt;What new or secondary risks does this change create, and how will they be monitored or mitigated?&gt;</i>

### FORM PROCESS FLOW:

Project Manager:

- Discuss changes with Project Sponsor and have sponsor sign form to approve.
- Forward Sponsor-signed form to cPMO Manager.
- Forward Sponsor-signed form to Executive Sponsor or Steering Committee for approval.
- File signed form with Project Management documents.

**Once all approvals obtained, remember to update milestone, schedule, scope, budget, communication and/or risk areas of your Project Management Plan!**

### APPROVED BY:

Title / Name	Signature	Date
<i>Project Sponsor /</i>		

# PROJECT EVALUATION REPORT



<NOTE TO AUTHOR: The blue italicized text throughout this template is provided solely as background information or examples to assist the author in creating this document. Please delete all such text, as well as the instructions in each section, prior to submitting this document. **ONLY YOUR PROJECT-SPECIFIC INFORMATION SHOULD APPEAR IN THE FINAL VERSION.** For more information about the use of this form, refer to Metro’s Construction Project Management Guide.>

<b>Project Name</b>	<insert copy here>
<b>Department</b>	<insert copy here>
<b>Project Manager</b>	<insert copy here>

## PROJECT EVALUATION PROCESS SUMMARY

<b>Coordinator</b>	<insert copy here>
<b>Participants</b>	Internal: <insert copy here> External: <insert copy here>
<b>Facilitators</b>	<insert copy here>

Project team members, internal stakeholders and external stakeholders participated in a lessons-learned discussion to identify opportunities for improvement. The discussions were conducted both in a group setting and in individual meetings. Results from the discussions, along with other project metrics, were used to complete the project evaluation report.

### Project Review

<insert copy here>

### Project Objectives Performance

<insert copy here>

### Deliverable Performance

<insert copy here>

### Schedule Performance

<insert copy here>

### Budget Performance

Item	Planned	Actual	Variance	Explanation
<insert copy here>				
<insert copy here>				

# PROJECT EVALUATION REPORT



## LESSONS LEARNED

### Successes

*<insert copy here>*

### Framing

*<insert copy here>*

### Analysis

*<insert copy here>*

### Public Involvement

*<insert copy here>*

### Process

*<insert copy here>*

### Cross-departmental Communications

*<insert copy here>*

### Metro Council Communications

*<insert copy here>*

*<insert copy here>*

### Internal Communications

*<insert copy here>*

### Project Management

*<insert copy here>*

### Deliverables

*<insert copy here>*

## AREAS FOR IMPROVEMENT

### Framing

*<insert copy here>*

### Analysis

*<insert copy here>*

### Public Involvement

*<insert copy here>*

### Process

*<insert copy here>*

# PROJECT EVALUATION REPORT



## **Cross-departmental Communications**

*<insert copy here>*

## **Metro Council Communications**

*<insert copy here>*

## **Internal Communications**

*<insert copy here>*

## **Project Management**

*<insert copy here>*

## **Deliverables**

*<insert copy here>*

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## **RECOMMENDATIONS**

1.