Appendix K: *Leadership Group Initiation & Project Sizing Checklist*

The following checklist is to be used by *Project Managers* for *Leadership Group* initiation of a project and when creating a sizing. Refer to *Section 11: Master Planning* of the *Project Management (PM) Handbook* for more details. The checklist can be created from the *Leadership Group Initiation & Project Sizing Checklist* template and saving it as a separate document.

Done (✓)	***Step***	***Project Sizing Task***	***Section. Page #***
		REQUEST TO SIZE	
	1	Review *PM* handbook, *Section 11: Master Planning.*	11.1 – 11.20
	2	Preliminary *Scope & Approach* & *ROI* submitted.	11.2 – 11.3
	3	Complete/refine the *Scope & Approach* and ROI documents.	11.2 – 11.3
	4	Review *Scope & Approach* and *ROI* documents with Supervisor and Division Manager.	11.3
	5	Submit an email to *Project Management Office (PMO)* at least one week prior to the scheduled Quarterly Leadership Group Meeting for a *Scope & Approach,* and *ROI* document review. PMO will deploy to web site for *Leadership Group* review. Depending on need, an emergency meeting may also be scheduled. **Note:** During the Master Planning process documents do **not** need to be submitted to PMO, but the PM will update a spreadsheet to be presented at LG Meetings.	11.3 – 11.4
	6	Project authorized for Sizing by *Leadership Group*.	11.3- 11.4
		PROJECT SIZING	
	7	Add ETC to the task in the *Sizing Budget* project. Set **Task ID** = the **Project ID** of the project being sized. Enter a **Charge Code**.	12.2
	8	Create a Sizing Project in *Clarity* using one of the existing templates.	11.4 – 11.5
	9	Complete Project Properties, enter all required fields, and uncheck template option.	11.6 – 11.9
	10	From the *Clarity* Team tab, add all roles needed for the project. Set the **Default Allocation** to be no more than 25%. Populate the **Staff OBS Unit**.	11.9 – 11.11
	11	From *Clarity Open Workbench*, refine the *Work Breakdown Structure (WBS)*. Enter estimated hours on *Preliminary Estimate* task for each phase of the project using generic roles. Include technical roles and hours if needed.	11.11 – 11.12
	12	Perform a final review of the project with the *Clarity Open Workbench Size Estimates Views.*	11.12
	13	Update/refine *Scope & Approach and ROI* documents. Add the *Size Estimate (+/-10% to 50%)* view to the last page of the *Scope & Approach*.	11.12 – 11.13
	14	Review *Scope & Approach and ROI* documents and *IT Strategies and Initiatives* with Supervisor and Division Manager.	11.13

Done (✓)	***Step***	***Project Sizing Task***	***Section. Page #***
	15	Attach *Scope & Approach and ROI* documents to project.	11.13
	16	Submit an email to *Project Management Office (PMO)* for a *Sizing Assurance & Compliance* review and approval. **Note:** Forward at least one week prior to the scheduled Quarterly Leadership Group Meeting. Depending on need, an emergency meeting may also be scheduled.	11.13
	17	Complete the task in the *Sizing Budget* project.	12.2