# Appendix I: *Project Planning Checklist*

The following checklist is to be used by *Project Managers* when creating a project plan. Refer to the appropriate section of the *Project Management (PM) Handbook* for *Project Planning* details. The checklist can be created from the *Project Planning Checklist* template and saving it as a separate document.

| ***Done (✓)*** | ***Step*** | ***Project Planning Task*** | **Section Page #** |
|---|---|---|---|
| | 1 | Review *PM* handbook, *Section 2: Planning.* | 2.1–2.31 |
| | 2 | Prepare/finalize the project *Scope & Approach* document. | 2.3 |
| | 3 | Prepare/finalize the project *Return on Investment (ROI) Analysis* (if applicable). | 2.4 |
| | 4 | Create a project in *Clarity* using one of the existing templates. | 2.6 |
| | 5 | On the Schedule link, enter Charge Code and Project Sponsor. | 2.8-2.9 |
| | 6 | On the Environmental Risk link, enter the Business and Technical Risk. | 2.9 |
| | 7 | On the IT Strategies and Initiatives link, check the appropriate IT Strategies. | 2.10 |
| | 8 | On the Financial link, select Open for Financial Status, select the Department and select the Investment Class. | 2.11 –12 |
| | 9 | Meet with SEP and EA teams to determine involvement required. | 2.2 |
| | 10 | Negotiate resources with *Resource Manager*. The request should include the required skill set, the timeframe the resource will be needed, and the approximate amount of effort. | 2.21 |
| | 11 | On the Team tab, assign resources (staff), add participants, and determine resource allocations. Default allocation should be in line with Total Usage. Add Allocation Segments if needed. | 2.21 |
| | 12 | Add *Administrator*, *Supervisor,* and *Division Manager* as participants. Make Clarity *Administrator* a *Collaboration Manager*. | 2.14 |
| | 13 | Attach *Scope and Approach* and *ROI* documents to *PM* folder in project. | 2.14–15 |
| | 14 | From *Open Workbench*, refine the *Work Breakdown Structure (WBS)*. Add, delete, and modify tasks and milestones. | 2.15–19 |
| | 15 | Create dependencies. | 2.19–20 |
| | 16 | Assign resources and estimates to tasks. | 2.21–26 |
| | 17 | Plan for *PM (20%)*, *Contingency (10%)* and S*cope (5%).* | 2.21–29 |
| | 18 | *Autoschedule* the project using the anticipated start date. | 5.2–5 |
| | 19 | Troubleshoot, refine the schedule and review resource load. | 5.5 |
| | 20 | From Reports & Jobs, run the *Resource Utilization* Detail and Summary report by Project. Work with the *Resource Manager to* resolve any resource over commitment. | 10.7–8 |
| | 21 | Perform a final review of the project with the *Clarity Open Workbench Assurance & Compliance Views*. Print the task plan for review. | 5.7–9 |
| | 22 | Review *Scope & Approach*, *ROI*, and task plan with *Supervisor* and the *Division Manager*. | 5.7–9 |

| ***Done (✓)*** | ***Step*** | ***Project Planning Task*** | **Section Page #** |
|---|---|---|---|
| | 23 | Submit an email to *Project Management Office (PMO)* for *Assurance & Compliance* review and approval. Include a pdf copy of the *Resource Utilization* reports.<br>**Note:** The final project must be submitted to *PMO* by 5:00 pm on Wednesday to be on the agenda for the following Wednesday's *Project Approval Meeting*. | 5.7–8 |
| | 24 | Obtain project approval (*Steering Committee*). | 5.7–8 |