

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 <i>PM</i> handbook, <i>Section 11: Master Planning</i> .	11.1 – 11.20
	2	Preliminary <i>Scope & Approach & ROI</i> submitted.	11.2 – 11.3
	3	Complete/refine the <i>Scope & Approach</i> and <i>ROI</i> documents.	11.2 – 11.3
	4	Review <i>Scope & Approach</i> and <i>ROI</i> documents with Supervisor and Division Manager.	11.3
	5	Submit an email to <i>Project Management Office (PMO)</i> at least one week prior to the scheduled Quarterly Leadership Group Meeting for a <i>Scope & Approach</i> , and <i>ROI</i> document review. PMO will deploy to web site for <i>Leadership Group</i> 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 <i>Leadership Group</i> .	11.3- 11.4
		PROJECT SIZING	
	7	Add ETC to the task in the <i>Sizing Budget</i> project. Set Task ID = the Project ID of the project being sized. Enter a Charge Code .	12.2
	8	Create a Sizing Project in <i>Clarity</i> 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 <i>Clarity</i> 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 <i>Clarity Open Workbench</i> , refine the <i>Work Breakdown Structure (WBS)</i> . Enter estimated hours on <i>Preliminary Estimate</i> 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 <i>Clarity Open Workbench Size Estimates Views</i> .	11.12
	13	Update/refine <i>Scope & Approach</i> and <i>ROI</i> documents. Add the <i>Size Estimate (+/-10% to 50%)</i> view to the last page of the <i>Scope & Approach</i> .	11.12 – 11.13
	14	Review <i>Scope & Approach</i> and <i>ROI</i> documents and <i>IT Strategies and Initiatives</i> with Supervisor and Division Manager.	11.13

Done (✓)	Step	Project Sizing Task	Section. Page #
	15	Attach <i>Scope & Approach and ROI</i> documents to project.	11.13
	16	Submit an email to <i>Project Management Office (PMO)</i> for a <i>Sizing Assurance & Compliance</i> 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 <i>Sizing Budget</i> project.	12.2