



Information Technology Services

Project Manager Checklist Large Projects – Class 3 and Above

Project: Project Manager:				
Phase	<input checked="" type="checkbox"/>	Activities	Key Document Deliverables	Additional Deliverables
Define 	<input type="checkbox"/>	<input type="checkbox"/> Identify customer and project needs		
		<input type="checkbox"/> Assign Project Class		
		<input type="checkbox"/> Create initial Work Plan (WBS)		
		<input type="checkbox"/> Develop Proposal <ul style="list-style-type: none"> • Problem/Opportunity Statement • Goals and Objectives • Methods and Approach • Success Criteria • Risks and Dependencies • Resources • Estimated Duration • Estimated Budget • Complete Initial Request for Change (RFC) 	<input type="checkbox"/> Project Proposal	
		<input type="checkbox"/> Proposal Reviews <ul style="list-style-type: none"> • Core Technology – System Design & Administration, NTS, Security • Applications & Project Management – System Design, Project Management • Business and Resource Management – Funding, Budgeting, Procurement, HR • Client Services and Security - Licensing, Security, New Services, Support Center 		
		<input type="checkbox"/> Other UCSC Reviews <ul style="list-style-type: none"> • PP&C Review • Strategic Sourcing Support for RFP • Staff HR – New Hire Recruitment 		
		<input type="checkbox"/> Assign Project Manager		
		<input type="checkbox"/> Sponsor Approval		
		<input type="checkbox"/> Phase Gate - ITS SMT Approval		
Plan 	<input type="checkbox"/>	<input type="checkbox"/> Develop Charter <ul style="list-style-type: none"> • Problem/Opportunity Statement • Benefits • Goals • Stakeholders and Clients 	<input type="checkbox"/> Project Charter <input type="checkbox"/> Project Budget <input type="checkbox"/> Resource	



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Phase	<input checked="" type="checkbox"/>	Activities	Key Document Deliverables	Additional Deliverables
		<ul style="list-style-type: none"> Objectives Deliverables Approach and Methodology Timeline Success Criteria Issues and Policy Implication Risk Management Plan Technical Features Organization and Staffing Budget Training Communication 	Requirements	
		<input type="checkbox"/> Deepen Work Breakdown Structure (WBS)	<input type="checkbox"/> WBS	
		<input type="checkbox"/> Resource Plan <ul style="list-style-type: none"> Staff Resources Budget 	<input type="checkbox"/> Resource Requirements <input type="checkbox"/> Project Budget	
		<input type="checkbox"/> Communications Management Plan	<input type="checkbox"/> Communications Plan	
		<input type="checkbox"/> Issues and Risk Management Plan	<input type="checkbox"/> Issues/Risks Log	
		<input type="checkbox"/> Procurement Plan		
		<input type="checkbox"/> Service Strategy		
		<input type="checkbox"/> Exec Sponsor Review/Funding Approval		
		<input type="checkbox"/> Team Assignments	<input type="checkbox"/> Resource Requirements	<input type="checkbox"/> Copy Approved Resources to Team Member and ITS Director
		<input type="checkbox"/> Conduct Sponsor Review/Funding Approval		
		<input type="checkbox"/> Phase Gate – Sponsor Approval		
		<input type="checkbox"/> Project Governance Defined	<input type="checkbox"/> Steering Committee Charter	
		<input type="checkbox"/> Phase Gate – SMT Project Approval		<input type="checkbox"/> Copy Approved Project Charter, Budget and Resource Requirements Documents to PMG <input type="checkbox"/> Copy Approved Budget to Business & Resource Management



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Phase	<input checked="" type="checkbox"/>	Activities	Key Document Deliverables	Additional Deliverables
				<input type="checkbox"/> Copy All Approved Documents to Project Sponsor
Launch	<input type="checkbox"/>	<input type="checkbox"/> Launch Kick-off Meeting <input type="checkbox"/> Project Plan Review and Assessment <input type="checkbox"/> Team Assignments <input type="checkbox"/> Initial Risk Review <input type="checkbox"/> Phase Gate- Resources (Staff and Budget) Available and Final Schedule Approved	<input type="checkbox"/> Resource Requirements <input type="checkbox"/> Issues/Risks Log <input type="checkbox"/> Resources by Unit or Work Package	<input type="checkbox"/> Copy Approved Resources to Team Member and ITS Director
Manage	<input type="checkbox"/>	<input type="checkbox"/> Schedule Management <input type="checkbox"/> Requirements Definition <input type="checkbox"/> System Design & Build <input type="checkbox"/> Service Design and Transition <input type="checkbox"/> Project Change Control Management <input type="checkbox"/> Cost Management <input type="checkbox"/> Issues and Risk Management <input type="checkbox"/> Internal and External Communications <input type="checkbox"/> Submit RFC	<input type="checkbox"/> Revised WBS <input type="checkbox"/> Requirements Specification <input type="checkbox"/> Gap Analysis <input type="checkbox"/> System Design <input type="checkbox"/> System Quality Plan <input type="checkbox"/> System Test Plan <input type="checkbox"/> Project Change Control <input type="checkbox"/> Project Budget <input type="checkbox"/> Issues/Risks Log <input type="checkbox"/> Project Status Report <input type="checkbox"/> Request for Change form	<input type="checkbox"/> Sponsor Sign-Off <input type="checkbox"/> DRB Review <input type="checkbox"/> Copy Approved Project Change Control to PMG <input type="checkbox"/> Copy Project Budget updates to Business Services <input type="checkbox"/> Send Project Status Reports to Sponsor, Stakeholders, Team as appropriate <input type="checkbox"/> Copy Project Status Reports to PMG <input type="checkbox"/> Submit RFC to Change Manager



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Phase	<input checked="" type="checkbox"/>	Activities	Key Document Deliverables	Additional Deliverables
		<input type="checkbox"/> QA and Testing Plan		
		<input type="checkbox"/> Phase Gate – Implementation Approval by Sponsor		
Close	<input type="checkbox"/>	<input type="checkbox"/> Transition to Production <ul style="list-style-type: none"> • System Deployment • Training • User and Support Documentation • Post go-live operational support • Service Transition & Operation 		<input type="checkbox"/> IT Services New/Changed Services Release
		<input type="checkbox"/> Closure Meeting and Lessons Learned	<input type="checkbox"/> Lessons Learned Review	<input type="checkbox"/> Copy Lessons Learned Review to PMG
		<input type="checkbox"/> Administrative Closure <ul style="list-style-type: none"> • Final punch list • Budget close out • Final status report • Sponsor signoff 	<input type="checkbox"/> Project Closure Review	<input type="checkbox"/> Copy Approved Project Closure Review to PMG <input type="checkbox"/> Notify Business Services of Budget Close Out
		<input type="checkbox"/> Celebrate!		