Group Project

-University of Texas at El Paso (UTEP) Project Management Plan (PMP) Report-

Measurable Gains to Improve Student-Athletes Skills Training

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IDE 761 - Strategies in Educational Project Management

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March 24, 2022

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Executive Summary

Case Description. The purpose of this project is to create a Project Management Plan (PMP) to assist the University of Texas at El Paso (UTEP) Soccer Program Coaching Staff (client) in managing a plan that was developed using instructional design solutions. The current plan was designed to implement instructional solutions at the beginning of the next academic year to address their student-athletes, especially freshman and transfer students who miss classes, study sessions, and are sometimes late for workout/exercise and athletic practice sessions. The UTEP Soccer Coaching Staff has determined that their student-athletes are not meeting expectations regarding required classwork and academic study sessions. This affects their ability to manage day-to-day schedules, such as attending study programs, social activities, and getting around campus efficiently to ensure on-time arrival for athletic practice/workouts.

Summary of the Report. The UTEP PMP is designed to manage the process while implementing the structure using established strategies that integrate with the Analysis, Design, Development, Implementation, and Evaluation (ADDIE) model in connection with the key tasks in the Five-Phase Project Management process. Throughout this final report, critical aspects of the management process will rely heavily on the project plan, budget, risk/assumptions, timelines, product quality (deliverables), and client satisfaction. As such, the management process will provide a full explanation, including visuals, to ensure client comprehension.

Overview of the PMP Sections. The UTEP PMP is an eight-month cycle of developing instruction, evaluation, and implementation to improve student-athletes performance problems. The **DEFINE** phase is where the project's purpose, goals, and objectives are defined through the problem/opportunity, scope, and success criteria. The **PLAN** phase establishes the project by outlining objectives and integrating scope, cost, and scheduling to align project plans. The **ORGANIZE** phase takes critical parts of the define/plan phases and provides structure based on project needs, team structure, recruiting criteria, and work tasks that will support work packages. The **CONTROL** phase is where the PM implements the plan and creates the project outcome with their team to manage strategies and develops control tools. The **CONTROL** phase documents the project termination procedures allowing the PM and the client to agree on the final report and sign-off authority. Together, the phases help the PM and client establish mutual trust based on a combined goal linked through time, cost, and product quality.

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Define Phase

The DEFINE phase is where the project's purpose, goals, and objectives are defined through the problem/opportunity, scope, and success criteria. Resources, assumptions, and risks are identified to determine the project's needs to help assess necessary information to lead to quality product success. This information will support a "go/"no-go" criteria of the overall project and frame decision points between the Project Manager (PM) and the client while framing the foundation of the planning activities and the content contained within (Weiss & Wysocki, 1992).

Problem/Opportunity

The UTEP Soccer Coaching Staff has determined that their student-athletes are not meeting expectations regarding required classwork and academic study sessions. This affects their ability to manage day-to-day schedules, such as attending study programs, social activities, and getting around campus efficiently to ensure on-time arrival for athletic practice/ workouts. It was determined through a Front-End Analysis that student-athletes are struggling with their academic standings and their potential to be successful athletes. The analysis shows that this primarily affects new student-athletes, such as freshmen and new transfers, who lack the knowledge and skills in time management to meet these requirements. As a result, the new students fail to comprehend the consequences that link their classroom performance to their athletic performance, resulting in multiple issues across the UTEP Soccer team. It is necessary to take action and ensure student-athletes succeed on and off the soccer field (academically, athletics).

Project Goals

The goal is to manage, develop, and provide instructional solutions starting in January (spring), then launch an implementation program in August (summer), and lastly, complete a follow-up and evaluation period through September and October (fall). This will ensure the goal is practical and supports the UTEP Coaching Staff Soccer Program; the plan will create the most effective, efficient, and inclusive planning methods aligned with cost, time, and quality while aligning their vision with the scope of work.

Project Objectives

The project will follow measurable goals, sub-goals, and progress indicators towards a realistic and achievable framework shaped around time, budget, and specific actions while producing actionable results. This project will span a ten-month schedule of five-day periods starting in January and ending in October. The milestones for this project objectives include:

    1. PMP activities will establish a base for project success through team orientation, project focus, and success criteria for training completion by August.

    2. The PM Team will analyze the current proposal to ensure it achieves the most effective, efficient, and inclusive plan to accomplish the client's goals.

    3. The PM Team will develop and manage a system of measurable independent tasks that will ensure success by focusing on time, resources, and quality of products.

Success Criteria

The project will measure success through dates/times, resources/budget, quality of the product:

- The PM team designs and conducts training platform integration of UTEP Soccer coaching/athletic staff, ID team specialists, and the soccer team on schedule.

- The PM team completes the program by designing instructional material for distribution and developing training with the certification before the start date.

- The ID materials will be produced based on need, resourcing, and provide effectiveness.

- Scheduled follow-up sessions will explore development needs and provide valuable feedback to support the PM team toward transitioning the program.

- The coaching staff will track feedback with scaled improvements from the performance problem; measurable tasks will support the final transition from the PM team.

- The project will incorporate the new multimedia deliverable into the presentations.

Assumptions and Risks

A few assumptions and risks must be factored into the plan throughout this project. While this is an initial review, this assessment will be continuously monitored and updated for the duration of the project to ensure the success of the PMP process. Below are known assumptions and risks:

- Program failure could result in new students failing classes, losing scholarships, and a degradation in the athletic program due to a decline in future attendance.

- The program must start on time; failure will affect the UTEP coaching staff's planned activities; issues could result from new student-athletes through ongoing semesters.

- The PM team must be flexible with the coaching staff. The coaches may have time conflicts, participation in project activities should adjust quickly when necessary.

- The PM team should include senior student-athletes as mentors to support program success; they have the maturity and routines to make good role models to new athletes.

- Student mentors may be used, and it is on a volunteer basis only; no pay is allocated to student-athletes involved in the development of facilitation of this instruction.

- Student mentors will monitor "service requirements/student-athlete time."

- While UTEP is located in a hot weather climate, weather-related issues can cause power outages and transportation issues between January and March.

- For planning factors, the start of school (spring) is January 10th for week #1.

- Before delivery, the coaching staff is trained on the new multimedia deliverable/element.

- The IT staff is available to support the new multimedia, as needed.

Plan Phase

The PLAN phase is similar to the DESIGN phase in the ADDIE process because it establishes the project through gathering information (Syracuse University, 2022c). During this phase, key activities are determined through the Work Breakdown Structure (WBS), which outlines objectives integrates scope, cost, and scheduling to align project plans. By doing so, the plan phase provides detailed information such as a critical path to detail projected timelines, project scope, and budget requirements to support a quality product (Weiss & Wysocki, 1992).

Work Breakdown Structure

The WBS was developed in three main project objectives. Each objective provides supportive activities and lists the associated sub-activities to support UTEP Soccer Team's overall goal. The activities are broken down for the client to achieve the intent.

Activity Characteristics Legend:
1-Status/completion measurable; 2-Clear start/end date event; 3-Time/cost easily estimated; 4-Manageable/measurable/integratable/independent

Activity No.	Activity Description	1	2	3	4
1.0	PMP Activities for Initial Project Success	Y	Y	Y	Y
1.1	Initial PM team introduction and orientation to UTEP	Y	Y	Y	Y
1.2	Introductions: PM team, Coaching/athletic staff, ID team, and Soccer team	Y	Y	Y	Y
1.3	A team on the ground: Creating project focus	Y	Y	Y	Y
1.4	Establish project success criteria	Y	Y	Y	Y
2.0	Analyzing the Current Proposal to Accomplish the Client's Goals	Y	Y	Y	Y
2.1	Assess current plan and activities	Y	Y	Y	Y
2.2	Identify problems with external factors; link assumptions to needs & wants	Y	Y	Y	Y
2.3	Provide necessary solutions to identified problems	Y	Y	Y	Y
2.4	Conduct Practical Exercises	Y	Y	N	Y
2.5	Create instructional materials and platform support (multimedia, handouts)	Y	Y	N	Y
2.6	Schedule follow-up sessions	Y	Y	Y	Y
3.0	Develop and Manage a System of Measurable Independent Tasks	Y	Y	N	Y
3.1	Establish evaluative criteria & final report for program completion	Y	Y	N	Y
3.2	Develop evaluation rubrics	Y	Y	Y	Y
3.3	Develop participant evaluations	Y	Y	Y	Y
3.4	Evaluation and feedback: coaching staff and supportive senior student-athletes	Y	Y	Y	Y
3.5	Evaluation and feedback: student-athlete participants	Y	Y	Y	Y
3.6	Analyze and Summarize Data for Final Report Deliverable	Y	Y	Y	Y

Activity Estimates

The estimated activity reflects the projected time and sequencing, supporting the WBS activity 2.5. Below is an example of the project estimate which supports the sequencing to meet the timeframe needed to complete the subtask activities.

Project Estimate

Time – *in days*; Start schedule – *Period 1 (each period is 5 days)*

Activity No.	Activity Description	Sequence relationships		Estimated Time / Start	
		before	after	*days*	*period*
2.5.1(A)	Create Time Mgt (TM) plan for materials (handouts/journals/ guides)	2.3(B)	1.3	2	26
2.5.2(B)	Create TM plan for platform support (multimedia platforms)	2.3(C)	1.3(A)	3	26
2.5.3(C)	Develop materials and platform support Instruction	2.4(D)	2.1(B)	5	27
2.5.4(D)	Produce materials for publications (outsource)	2.5(E)	2.2(C)	5	28
2.5.5(E)	Test platform support instruction (use all multimedia sources)	2.6(F)	2.3(D)	5	29
2.5.6(F)	Start instructional sessions using materials & platform support	3.1(G)	2.4(E)	5	30
2.5.7(G)	Train and transfer instruction to client	3.2	2.5(E,F)	10	32

Critical Path

The critical path determines the sequencing of concurrent activities critical to the completion of the project for supporting time, efficiency, and effectiveness. The critical path methods used provide information on each activity to support the estimated completion (E) time, earliest start (ES), earliest finish (EF), latest start (LS), and latest finish (LF). The critical path below supports the UTEP Student-Athlete Improvement Sessions, specifically, activity 3.2 (Create Instructional Materials and Platform Support). As shown below, the ES activities provide predecessor activities (upper left), and the EF displays the predecessor activities (upper right). The LS and LF are the latest time the activity can start without increasing project completion time. The LS is equivalent to its LF, minus its projected completion time. As shown below, LF is immediate predecessor activities (bottom left) and is minimum to the LS activity (bottom right). The provided graph shows the activity in the critical path network.
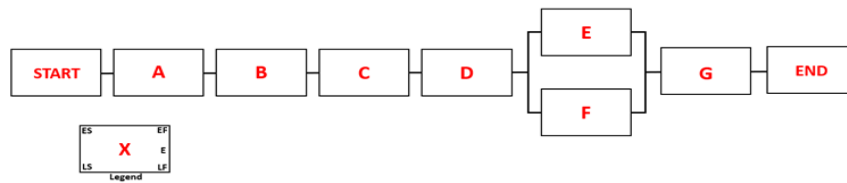
Path: A, B, C, D, E, F, G – *Critical Path*: Duration is 35 days, ending at week 32

Project Proposal

New students of the UTEP Soccer Team lack the knowledge and skills related to time management and need specially designed instruction for their student-athletes that can support their academic and athletic requirements. The needs of the coaching staff and the student-athletes are essential. This will ensure the goal is practical and supports the UTEP Coaching Staff Soccer Program, which will create the most effective, efficient, and inclusive planning methods aligned with cost, time, and quality while aligning their vision with the scope of work. Within these areas, the following activities will support the achievement of those needs:

  i. PMP Activities for Initial Project Success.

    a. Initial PM team introduction and orientation to UTEP.

  b. Introductions: PM team, Coaching/athletic staff, ID team, and Soccer team.

  c. A team on the ground: Creating project focus.

  d. Establish project success criteria.

ii. Analyzing the Current Proposal to Accomplish the Client's Goals.

  a. Assess current plan and activities.

  b. Identify problems with external factors; link assumptions to needs & wants.

  c. Provide necessary solutions to identified problems.

  d. Conduct Practical Exercises.

  e. Create instructional materials and platform support (multimedia, handouts).

  f. Schedule follow-up sessions.

iii. Develop and Manage a System of Measurable Independent Tasks.

  a. Establish evaluative criteria & final report for program completion.

  b. Develop evaluation rubrics.

  c. Develop participant evaluations.

  d. Evaluation and feedback: coaching staff and supportive senior student-athletes.

  e. Evaluation and feedback: student-athlete participants.

  f. Analyze and Summarize Data for Final Report Deliverable.

The project will start in January with the development phase. In July, the PM team will transition to the evaluation period; then move into August for the implementation phase for a total of eight months. The overall goal is to improve the UTEP Soccer student-athletes abilities and better prepare them to comprehend, adapt, and correct their current performance to succeed at the university. The tools that will support this effort are the Gantt chart, network diagrams, project work packages, an outline, specific efforts, and strong work priorities. Additionally, using the designed critical path will ensure the project stays on the glide path while identifying essential tasks along the way. This ensures that the project success rate improves through shortened timelines, resource management, and better planning through progress prediction.

Organize Phase

The ORGANIZE Phase is similar to DEVELOPMENT in the ADDIE process as it deals with personnel and organizational management for work project tasks and project outcomes (Syracuse University, 2022d). Key areas of this phase include personnel need based on project needs, team structure, recruiting criteria, and work tasks that will support work packages. The organize phase will take critical parts of the define and plan phases and action their products into workable timelines and project scope to ensure the clients expected product needs are met on time with a quality product (Weiss & Wysocki,1992).

Team Organization & Structure

The ORGANIZE PHASE will begin once the client accepts the project proposal outlined in the define and plan phases. This phase is similar to the DEVELOPMENT in ADDIE as it shapes how personnel are identified, organized, and tasked to support the project outcome(s) (Syracuse University, 2022). Key areas of the organize phase will support personnel needs linked to project tasks, team structures, recruitment criteria based on project tasks, and work tasks. Each factor of this phase is organized into work packages to shape and maintain timelines, budget requirements, and project scope to ensure the quality of the project (Weiss & Wysocki, 1992).

The UTEP organizational structure is designed to ensure the project's success and ensure project flow. The hierarchy is based on the organizational position to support the PM during all phases. Like any project, communication is key to success. Understanding the departmental responsibilities and tiered structured responsibilities regarding capabilities and project team roles will enable work and task assignability. While the PM is key to the project's success, UTEP is the client and has sign-off authority in content and objective end-state.

The *UTEP Chancellor* is responsible for plans, programs, authority delegated by the governing board, and decision-maker for programs concerns on organizational, operational, and academic functions on campus for students and academics. As such, the Chancellor *has sign-off authority* before implementation and closure.

The *UTEP Athletic Director* provides vision, leadership, policy development, and strategic guidance for the athletics program, supporting its students' mission and athletic priorities. As such, the Athletic Director *has sign-off authority* before implementation and closure. Below is the UTEP Project Organizational Chart.

UTEP Project Organizational Chart
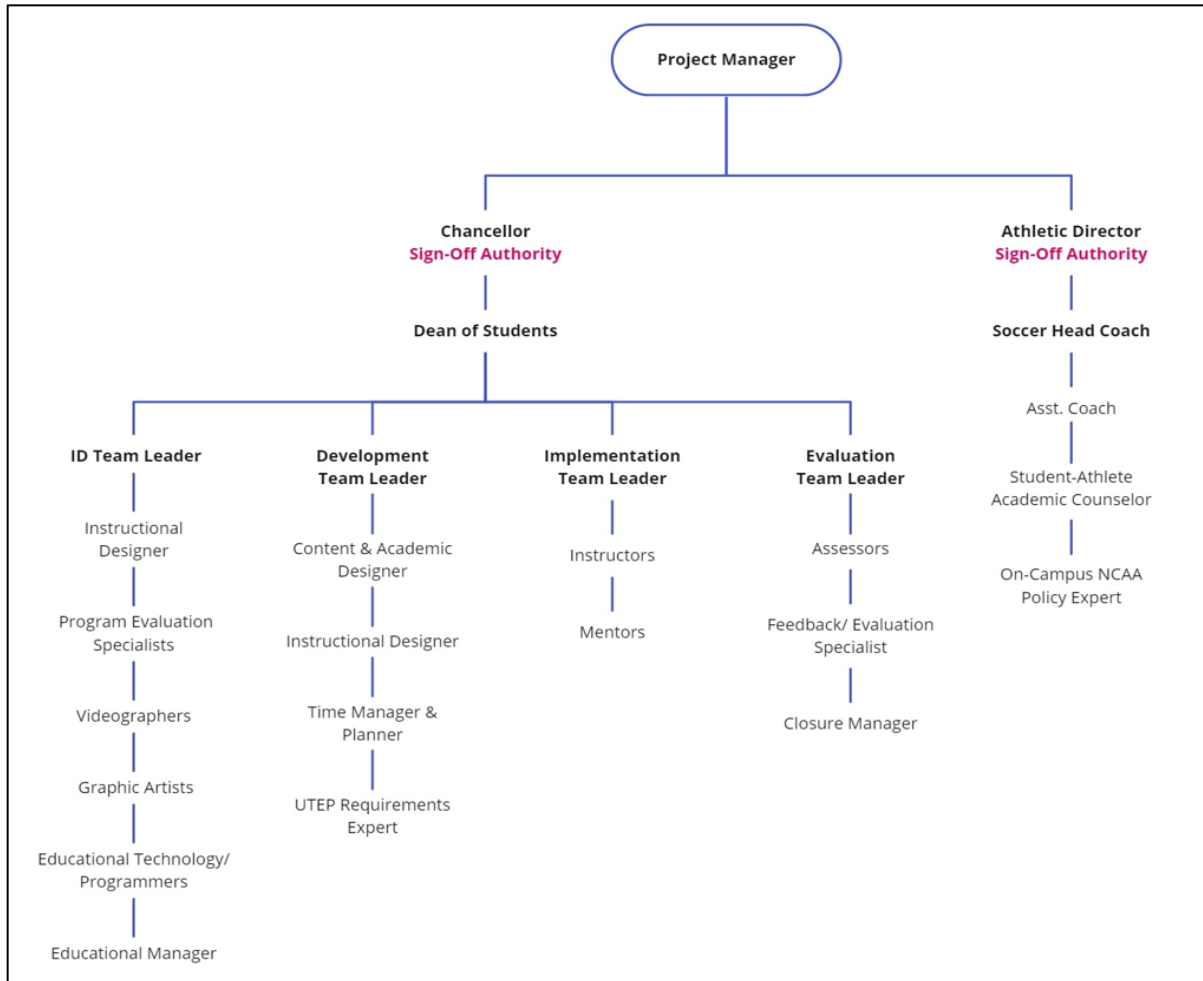
Personnel & Recruitment Requirements

The UTEP project will require various skilled personnel from different fields and expertise, including management, instructional design, graphics/videos specialists, content experts, evaluators/assessors, project specialists, instructors, technical experts, and supporting staff. As with the design and complexity of the program management, development, implementation, and evaluation aspects of the clients' needs, the scope to maintain time, budget, and product quality will require specific qualifications and experienced project personnel to accomplish the goal. Recruitment criteria for the required positions are necessary to achieve the project's needs, wants, and desired end-state. Below are some of the required recruiting criteria associated with this project.

Recruitment Criteria

Job Title	Criteria
Project Manager	• 7+ years experience of developing, managing, and detailing project schedules; must include work planning and time management supporting instructional projects • An understanding and/or background in athletic program design. • Experienced in determining and defining project scopes objectives, preparing a budget based on the scope of work, and allocating resource requirements. • Strong interpersonal skills and highly resourceful, 5+ years of leadership experience. • Capable of adaptability with the knowledge to apply problem-solving skills creatively. • Possess the skills in recruitment and personnel selection. • Experienced in contract management for project flow and completion of tasks while communicating expected deliverables to the client.
Instructional Designer (ID) (ID Team Leader)	• 3+ years of Instructional Design/Development experience in either industry or academic; industry or line of business experience. • M.S. in Instructional Design or Basic Instructional Design Certifications. • Experience collaborating with learning teams, writing learning objectives, developing knowledge assessments, and supporting trainer content. • Must understand the concept of developing participant and trainer materials using a variety of presentations and technologies or willingness to learn in the field. • Experience working with college-level staff/ faculty.
Content Expert (Development Team Leader)	• 5+ years of experience developing content and layout supporting academic platforms, time management, and organizational skills. • Strong interpersonal and communicational skills to support high-performing teams. • Must plan, produce, and publish content with on-time delivery of materials. • Experience supporting academics and athletics development. • Excellent knowledge of content and layout design tools such as Adobe InCopy and InDesign, and capable of learning new multimedia elements.

Project Work Packages

The UTEP project work packages have been designed to utilize the teams' knowledge and skills while supporting the project's tasks activities and linking experience with the respected team assignment. Each team has been assigned specific objectives in line with the overall goal in order to strategically align the nature of the project with the client's needs to ensure timely project completion. The UTEP project has three main objectives for the teams' primary focus. Each objective is developed from the WBS and broken down into phases throughout this report.

The work packages support a visual representation developed by the PM for the PM and the Development Team. This will support the project work for personnel, timelines, required skills, and a projected path to the success of the overall goal. Below is an example of the work packages for the PM and the Development Team for this project.

Control Phase

The CONTROL phase starts once the PM is identified, the team is hired, established, and assigned to project tasks. This is similar to IMPLEMENTATION in the ADDIE process and as it is where the PM implements the plan and creates the project outcome with their team (Syracuse University, 2022b). During this phase, the PM creates project work and management strategies to manage critical tasks, develops control tools and status report procedures, reviews and submits status reports, establishes project schedules, and manages through completion. Hiring key personnel is necessary to support the PM and enable the project's design. Team relationships will be vital in management and reporting (Weiss & Wysocki, 1992).

Control Strategies

Establishing leading measures to enable the project team to maintain an environment to progress and track objectives is essential to success during the control phase. The strategies employed during the UTEP project will include team orientations, team development, team management processes, conflict resolution, schedule resolution, and contingency planning.

Team Orientation. At the start of the project, the project team will conduct a team orientation with the new project team, the campus, the UTEP faculty/staff/soccer team, and shape a full understanding of their project scope, goals, objectives, and teams' functionality. This will help develop a positive relationship within their new project team and at UTEP.

Team Development. A good PM knows that the developmental cycle must process through the stages of team development to form before they achieve a high-performing team. However, enhancing their knowledge, awareness, project specifics, and engaging the key relationships can improve work performance faster. During this time, the project team will engage individually, and as teams to improve their communication barriers, group cohesiveness, and engage in various conflict resolution skills to enhance effective development in team performance.

Team Management & Project Evolution. The PM must establish trust and confidence with their teams, most notably with the team leaders. This will support effective leadership, motivation, empower reporting. Improving team support through the team leaders will: "Allow more freedom for individuals to guide their own work; Be a resource person rather than a controller, a facilitator rather than a boss; Act as a buffer between employees and outside problems or 'higher up' demands; Make sure that innovative ideas are transmitted to your boss with your support and backing; then insist on a feedback mechanism" (Weiss & Wysocki, 1992, p.72).

Conflict Resolution. Conflict will arise with any project and team dynamics; however, they could impact project objectives, resources, time, budget, and overall product quality. Managing conflict can be solved by collaborative problem-solving measures such as: defining the problem in terms of needs, not solutions; brainstorming possible solutions; selecting the solutions that will best meet both party's needs and checking possible sequences; planning who will do what, where, and by when; implement the plan; evaluate the problem-solving process at a later date, how well they turned out (Weiss & Wysocki, 1992, p.78). This measure should be done at the lowest level, using team leaders to resolve differences at unresolvable actions. The PM works with stakeholders and outside resources to deconflict any impacts to project success.

Schedule Resolution. Scheduling conflicts happen in any big project when dealing with many personnel and resources. Should the schedule conflict, the PM will review any potential effects on the project budget, resources, time, and product quality. The PM will address any issues, provide solutions, and deconflict the schedule to support any new changes according to any new paths to activities and scope which might affect team success.

Contingency Planning. The team has been made up of experts, each having different viewpoints and levels of communication available to provide efficient and effective reporting to enable a confident level of contingency planning. However, should issues do arise, the PM will develop additional requirements within the team design to resolve any unforeseen problems. Additionally, team leaders will report conflicts in timelines, budget, resources, and product quality during the weekly status report.

Communication Plan

The PM will enable effective communication planning and control measures using specific trackers and reports to support problem-solving, conflict resolution, and support cross-functional boundaries. As such, the project team will use the following communication practices: orientations, project updates, stakeholder meetings, status reporting, and variance reports, all of which will help support the development of the Gantt chart.

Project Updates/Readiness Meetings (Weekly). Project update meetings will be held weekly; however, they will alternate face-to-face (1st & 3rd Wed) and paper (2nd & 4th Wed) of the month. In a five-week month, no reports are necessary, request-for-information only. The meetings will consist of the PM, team leaders, and key briefers required for project updates. This update will serve to key the project on the glide path for personnel readiness, equipment, task updates, schedules status, budget status, quality/scope status, current/anticipated issues, next plans/steps.

Status Reporting (Bi-Weekly). The PM will receive status reports from the team leads bi-weekly, which will include: completed work, upcoming work, project budget and schedule summaries, current assigned tasks/activities/items, and action issues/risks with ways forward. These reports will support ongoing progress and update the Gantt Chart as necessary.

Stakeholder Updates/ Meetings (Monthly). Keeping the stakeholders updated ensures good communication, builds evidence of the project's performance, and can enable support along the way. The stakeholder meeting will be held once a month (4th Fri) and will include the PM, the Chancellor, the Dean of Students, the Athletic Director, and the Soccer Coach. The meeting will provide stakeholders with effective project status reports to align the project progress (on track/at-risk/off track), risk update, monitor costs, and timeline review.

Variance Reports (By Activity, As Needed). Complete by activity, the variance report provides the project's status and its activities. As such, a single format will be used to maintain consistency in the interest of budget, labor, time, materials, and equipment. All reports will be submitted to the PM, by activity, based on completion or status (ahead or behind schedule by one week) to ensure PM can trigger contingencies plans accordingly.

Scheduling

The PM develops a list of activities, deliverables, milestones, and organizes it through project scheduling. Efficient and effective scheduling involves planned start and finish dates, milestones, duration, resources, critical components, work necessary to complete deliverables, costs, dependencies, and the teams associated with each task; the Gantt Chart and Status/Variance Chart support this visual information. Below are examples of the UTEP Gantt Chart and Status/Variance Chart current projects.

Gantt Chart. The Gantt Chart has three key functions: 1) Build and manage a project, 2) Determine the logistical and task needs, and 3) Monitor the progress. As a tool for the PM, it provides the framework for shaping the objectives, activities, sub-activities, aligning tasks, and tracking the timeline along the project's path. It's key in linking the relationships and milestones in the project schedule and necessary for the UTEP project's success.

Objective	Activity	Sub-Activity	Skill	Start	Stop
2.0			DEV	2	35
	2.1		ID	3	6
		2.1.1	ID	3	4
		2.1.2	ID	4	5
		2.1.3	ID	5	6
	2.2		ID	6	9
		2.1.1	ID	6	8
		2.1.2	ID	8	9
	2.3		DEV	10	17
		2.1.1	DEV	10	12
		2.1.2	DEV	12	14
		2.1.3	DEV	14	16
	2.4		IMP	17	24
		2.1.1	IMP	17	20
		2.1.2	IMP	20,21	22,24
	2.5		DEV	26	34
		2.5.1	DEV	26	27
		2.5.2	DEV	26	27
		2.5.3	DEV	27	28
		2.5.4	DEV	28	29
		2.5.5	IMP	29	30
		2.5.6	IMP	30	31
		2.5.7	IMP	32	34

Status: 0-49% | 75-89% | 90-100%

Status/Variance Report. The variance report provides the PM and team leads the status of the project and its activities while enabling data to the methods to detect deviations from the planned timeline. The difference between the Gantt chart and the Status/Variance report measures the data and focuses on the timeline while providing visual detail for its activities.

Objective	Activity	Sub-Activity	Skill	Start	Stop	Status	Schedule Variance
2.0			DEV	2	35	25%	On Schedule
	2.1		ID	3	6	100%	Complete
		2.1.1	ID	3	4	100%	Complete
		2.1.2	ID	4	5	100%	Complete
		2.1.3	ID	5	6	100%	Complete
	2.2		ID	6	9	100%	Complete
		2.1.1	ID	6	8	100%	Complete
		2.1.2	ID	8	9	100%	Complete
	2.3		DEV	10	17	50%	On Schedule
		2.1.1	DEV	10	12	90%	Behind, 2 days
		2.1.2	DEV	12	14	90%	Ahead, 1 week
		2.1.3	DEV	14	16	0%	On Schedule
	2.4		IMP	17	24	0%	On Schedule
		2.1.1	IMP	17	20	0%	On Schedule
		2.1.2	IMP	20,21	22,24	0%	On Schedule
	2.5		DEV	26	34	0%	On Schedule
		2.5.1	DEV	26	27	0%	On Schedule
		2.5.2	DEV	26	27	0%	On Schedule
		2.5.3	DEV	27	28	0%	On Schedule
		2.5.4	DEV	28	29	0%	On Schedule
		2.5.5	IMP	29	30	0%	On Schedule
		2.5.6	IMP	30	31	0%	On Schedule
		2.5.7	IMP	32	34	0%	On Schedule

Status: 0-49% | 50-74% | 75-89% | 90-100%

Close Phase

The CLOSE phase will document the project termination procedures allowing the PM and the client to agree on the final approval and sign-off on the project. The close phase will initiate the final evaluation process in the project, which will include 1) Documenting with close audit procedures, 2) Obtaining acceptance of the deliverables, 3) Conducting the post-implementation audit, and 4) Issuing a final report (Syracuse University, 2022a). This will enable the PM and client to measure achievements against "The project plan, budget, time deadlines, quality of deliverables, specifications, and client satisfaction" (Weiss & Wysocki, 1992, p.103).

Client Approval

Client approval is a major part of the success of the project. Obtaining the client's approval/acceptance is necessary to ensure that the project has met the required timelines, resources, budget, and product quality specified in the scope of work established at the beginning of the initial phase. The PM will ensure a full report to include a project presentation is prepared for the client to assist in the PMP approval process. Additionally, the project team has designed the following deliverables to support the client's consideration for final approval:

Summary/Documentation of Project Phases. Documenting the project phases for the close process and the final report will require preparing the information into a format for presenting and gaining good insight for sign-off authority. This can be achieved through proper protocol and presenting the phases in a simple, upfront view. Below are the phases of the UTEP project with their key deliverables for documentation:

- **Define Phase.** Project problem, goals, objectives, risks, and success criteria.

- **Plan Phase.** Work breakdown structure, activity estimates, critical path, and project proposal.

- **Organize Phase.** Project organization/structure, personnel/recruitment requirements, and project work packages.

- **Control Phase.** Control strategies, communication plan, and scheduling (Gantt Chart, Variance Report).

- **Close Phase.** Client approval, final report, and sign-off agreement.

Post-Implementation Project Audit. The project audit serves as "An evaluation of the project's goals and activity achievement as measured against the project plan, budget, time deadlines, quality of deliverables, specifications, and client satisfaction" (Weiss & Wysocki, 1992, p.103). The driving questions of this audit will serve to seek the satisfaction of the client and their needs and wants. The questions posed are:

- Was the project goal achieved?

- Was the project work done on time?

- Was the project done within budget?

- Was the project done to your specifications?

- Where you (the client) satisfied with the project results?

This information will provide the PM and the project team with measures of success for their methods, activity data, and quality of work.

Project Issues in Project Management. The life cycle of any project, particularly when factoring in time, budgets, resources (such as people), and expecting an outside client-specific product, will always have unexpected outcomes. As such, problems and questions will always arise, and the PM will have to deal with them or could potentially affect the outcome of the project's goal(s) and objectives. During this project, a few key take ways that will ensure success and limit issues during project management:

- **When Managing in Complex Projects.** First, identify and plan for risk mitigation. Second, adjust any plans based on the available project resources. Third, track personnel operating on different project areas to achieve multiple objectives and goals. Forth, use your personnel skills based on the schedule as shortages can impact the available resources down the line. Lastly, the project schedule can be fluid based on the changing environment be productive based on the conditions of the workspace.

- **Project Impact.** Great impacts in project management are due to the rapid development of new technologies and the organization's ability to adapt. Use the new multimedia deliverables as an exciting tool. If the client is excited about it, so should the project team.

- **Successful Organizations.** Creating buy-in and getting the clients involved is a continuous process until completion. It is about responsibility and increases the favorable cost/benefit ratio for the project team and the end-user (the client).

Final Report

The final report compiled all the project's information and served as a project's history. The following elements have been reviewed and discussed for the overall success and performance of the project. This should lead to final client approval and sign-off approval based on (Weiss & Wysocki, 1992):

- The overall success, post-implementation, and performance of the project.

- The design and organization, and administration of the project

- The techniques to be used to accomplish project results.

- An assessment of project strengths and weaknesses.

- Final recommendations from the project manager and team for evaluation of the closing project.

Once the approval is complete, the final project will be sent to all stakeholders, and the PM will take initial steps to begin project start steps.

Client Sign-Off Agreement

Communication is critical, and the sign-off agreement solidifies the final process between the PM and the client; it allows the explanation of understanding to come into a full circle with the understanding of scope, standards, expected outcomes, and final intent of the goal(s) and objectives of the project on paper. **Appendix A (Project Client Sign-Off-Form)** provides a written closing agreement of the final report and allows the client to provide input, such as establishing a set of constraints in a document form to solidify their agreement. The document contains:

- The project name, date, and issued by

- Additional comments for acceptance by the client

- Metrics used, and metrics added

- Recorded shortfalls and lessons learned

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Appendix A

Project Client Sign-Off-Form

Project Client Sign-Off-Form	
Project Name:	
Issued By:	
Date:	
The project outcome has been measured for success and has been accepted for it criteria on behalf of the client	
Additional comments related to the clients acceptance:	
Metics Used:	
Metics Added:	
Recorded Shortfalls or Lessons Learned (if any):	

Name: _____   **Signature:** _____   **Date:**

      Executive/Client

Name: _____   **Signature:** _____   **Date:**

      Project Manager