|  |  |
| --- | --- |
| **Date:** |  |
| **Project Name & PSS:** |  |
| **Brief Project Description:** |  |
| **Executive Sponsor:** |  |
| **Project Sponsor:** |  |
| **Key Departments/Personnel:** |  |
| **Anticipated Start Date:** |  |
| **Anticipated End Date:** |  |
| **Project Size:**  |  |

LUC’s Project Management Office offers a wide variety of services to help your project succeed.

Please help us understand your expectations by selecting the activities in which you prefer your Project Manager be involved. Check all that apply:

**1.) Meetings**

[ ]  Facilitate/run meetings

[ ]  Generate agenda for meetings

[ ]  Generate meeting summaries/minutes

**2.) Project Management Documentation**

[ ]  Develop a scope document

[ ]  Create a project schedule

[ ]  Create a communication plan

[ ]  Other (at PM and/or Sponsor Discretion)

**3.) Task Management**

[ ]  Follow up on tasks with team members responsible for completing them

[ ]  Assertively enforce agreed-upon completion dates

**4.) Status Reporting**

[ ]  Include project in weekly status report

[ ]  Develop and distribute Executive Status reports

[ ]  Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**5.) PM Ownership/Decision-making Level**

[ ]  PM has an administrative role and will mainly be in charge of documentation and organization tasks.

[ ]  PM collaborates and develops consensus among stakeholders but will not make major decisions.

[ ]  PM contributes to the decision-making in order to run the project

[ ]  PM is more of a mentor or coach for another team member who actually has responsibility for running the project.

**6.) Business Process Analysis**

[ ]  Document existing-state business processes

[ ]  Document future-state business processes

[ ]  Review integration with other business systems

**7.) Testing**

[ ]  Coordination of testing

[ ]  Create or collaborate in the creation of test plans

**8.) Training**

[ ]  Organize training sessions

[ ]  Facilitate training sessions

[ ]  Create training documentation

**9.) Vendor Interaction**

[ ]  Be a point-of-contact with vendor for project

[ ]  Assist in contract discussions/negotiations

[ ]  Assist in RFI/RFP process

**10.) Presentations**

[ ]  Involvement in executive-level presentations

**11.) Project Budget**

[ ]  Assist in creation of project budget

Other expectations or notes about the project: