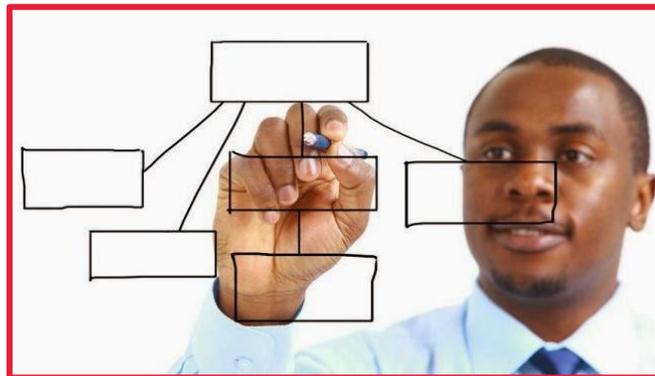




Writing Job-Related Projects



MCPM Project Handbook

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**Mississippi State Personnel Board
Office of Workforce Development
210 East Capitol Street, Suite 800
Jackson, MS 39201**

An accredited member of the



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The Benefits of Job-Related Projects

Deeper Learning: Job-related projects provide hands-on application of the knowledge and skills acquired in MCPM training sessions. These projects join major theories with practical application benefitting MCPM participants, agencies, and both internal and external customers.

Program Accreditation: Job-related projects are required for MCPM Program accreditation by the National CPM Consortium (NCPMC). NCPMC is the accrediting body for CPM Programs nationwide and requires that “. . . each program must provide opportunities for participants to apply the training to their work environments.”

Training Validation: The relevance of the MCPM program is demonstrated through the value agencies receive from job-related projects, confirming there is a measurable return for employee development. Projects demonstrate a tangible application of information gained in the MCPM program through documented improvement in products, services, and/or work processes.

MCPM Projects

The MCPM Program requires completion of three job-related projects conducted after attending MCPM Levels III, IV, and V. Projects apply major methodologies, research methods, and approaches to inquiry in management theory and illustrate their business impact on agencies through positive action. In each project, participants apply the theories and principles learned in MCPM classes to a situation, problem, concern, or opportunity within the workplace.

Defining the Scope of the MCPM Project

The scope of the job-related project is determined by incorporating MCPM class topics with the participant’s job function. The project must be applied within the work environment, including the people, relationships, and structure encountered in the context of job performance. All job-related projects should support the employing agency’s overall organizational objectives.

The amount, if any, of official work time used to complete the project is a matter to be determined by the MCPM participant and his/her supervisor. For example, if conducting a survey is needed to complete the project, the MCPM participant is responsible for obtaining approval from the appropriate department official(s) prior to conducting the survey. If a project includes a personnel issue, the personnel issue must be discussed in behavioral terms rather than in personal characteristics.

The project must involve action taken by the participant. Merely describing a problem in detail does not improve a product or service; **descriptive projects are not acceptable to meet MCPM Level III project requirements.** However, the result of the action does not have to be successful for the project to be approved as a learning experience. For more detail, see Grading Rubric for MCPM Levels III and V Projects in the Appendix.

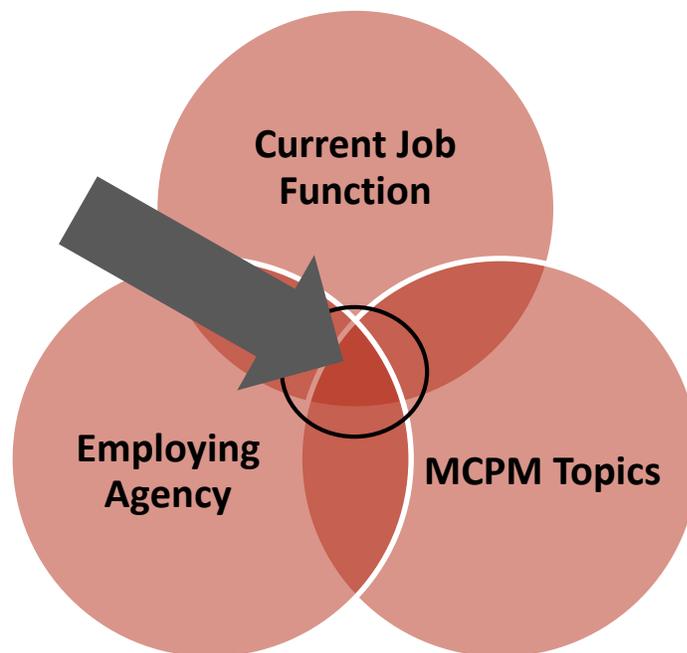
How to Identify Good Project Ideas

The 'Three Circle Test'

Using the illustration below, apply these three basic criteria to a project idea:

- Does the idea relate to current job responsibilities (work-related tasks, activities, projects, or interests) or to ideas for innovation/improvement of services or processes in the workplace?
- Does the idea relate to the employing agency and its needs - agency mission, goals, services, and customers?
- Does the idea relate to the information, theories, models, principles, or techniques learned in MCPM classes?

The intersection of class topics, job function, and agency needs is the best location for finding acceptable projects. For example, a project of improving the quality of service delivery of a service managed by an MCPM participant could lie at this intersection.



Be aware of your own innovative or creative thoughts about improving effectiveness or efficiency in your area of influence. Stay alert for possible project topics:

- While taking MCPM classes
- While performing daily job responsibilities
- When interacting with your manager about department or agency mission/goals, services, customers, or needs

Submitting the Project Proposal Form for the MCPM Level III Project

1. Select a topic for the project from examples provided or from discussion with an MCPM Project Evaluator (Evaluators are assigned by the MCPM Program Director). *Projects in progress prior to admission into the MCPM Program will not be accepted.*
2. Discuss the job-related project topic with the direct supervisor.
3. Complete an MCPM project proposal form and obtain the supervisor's signature.
4. Submit the MCPM project proposal form to the MCPM Program Director via email. The proposal will be forwarded to the assigned MCPM Project Evaluator for approval. The MCPM Project Evaluator has 30 days to review a proposal. *Please note, approval of the proposal does not constitute approval of a completed project nor will it affect MCPM Program activity status.* Once notified of the approval, work may begin on the project. Projects should NOT be started prior to receiving approval.
5. Complete the project and forward to the MCPM Program Director via email. The written report must conform to composition and format requirements as stated in this handbook.

The MCPM Project Evaluator has six weeks to review the project report and forward the completed evaluation to the MCPM Program Director with recommendations/comments. The MCPM Program Director will review the MCPM Project Evaluator's recommendations and advise the participant of either approval or suggestions for additional work via email.

MCPM Level III Project Suggested Topics

- Develop a management plan for the work unit, such as a strategic plan that improves effectiveness.
- Identify and correct a specific communication problem within the work unit or between work units, departments, the public, etc., in agreement with all impacted managers.
- Create a newsletter or training course designed to correct a specific problem within the unit.
- Apply the problem-solving process, including necessary research and analysis, to a specific problem or decision facing the work unit. Document the process and comment on the practicality of this process for routine problem-solving or decision-making tasks which the unit faces.
- Develop a plan to prepare your unit for a performance audit.
- Develop a plan to identify key motivators within the work unit and establish a plan to build on these motivators to increase worker productivity.
- Create a brochure to generate increased customer participation in a program.
- Revise or create a policy within the work unit to decrease absenteeism/turnover or increase employee engagement/morale.
- Revise a procedure to improve effectiveness.

Joint Projects

CPM Level III projects may be conducted by individual participants or jointly with other MCPM participants who are completing projects within MCPM Levels I-III. There can be no more than three people working on a project. The project must be large enough for two to three people to work on the project. One MCPM proposal form is submitted for joint projects, with each participant's information listed on the proposal form.

If a participant drops out of an approved joint MCPM project, the participant who does not want to participate in the joint project must submit a new proposal form with a new project idea to the MCPM Program Director.

MCPM Level IV Projects

The MCPM Level IV project is an assessment of a quality improvement need and is assigned after attending MCPM Level IV. The topics of MCPM Level IV provide the knowledge needed to correctly assess a quality improvement problem in the workplace. This project cannot be conducted jointly with other MCPM participants. As an assessment of a problem rather than the implementation of a solution, this project differs from MCPM Level III and Level V projects.

There is no project proposal form for the MCPM Level IV project, but you will need to discuss the chosen topic with your supervisor since you will implement it as your MCPM Level 5 project. Decide on the quality improvement need that most closely aligns with your work, and compose the report with the headings listed below. The report should be formatted according to the MCPM project formatting requirements presented on page 15, and submitted via email to the MCPM Program Director.

The MCPM Level IV project includes the following headings:

- **Assessment of Problem:** Clearly describe the quality improvement need/problem in your department/work unit. You may include any background information related to the need.
- **Identification of customer(s):** Clearly describe how internal and external customers are affected currently and how the planned solution will bring improvement.
- **Identification of the service:** Clearly describe the services provided in your work unit and how they relate to the need/problem.
- **Application of quality:** Clearly describe how the planned solution will improve quality, the impact this will make on the work unit, and what it will mean to the organization.
- **Criteria for evaluating and measuring quality:** Clearly describe the evaluation criteria that will determine if the planned solution solves the need/problem.
- **Barriers to solution:** Clearly describe at least two barriers and the contingency plans to mitigate their impact.

MCPM Level V Projects

The MCPM Level V project is the implementation of the MCPM Level IV project. The participant will implement the plan as described in the MCPM Level IV project, including data collection that provides an objective evaluation. The evaluation results tell whether the planned solution successfully improved the quality improvement need/problem. Whether or not the quality improvement need/problem was improved, the project can still an acceptable MCPM Level V project as long as an attempt was made and lessons learned are provided.

There is no MCPM project proposal form for the MCPM Level V project. The report is composed identically to the MCPM Level III project report. The report should be formatted according to the MCPM project formatting requirements presented on page 15, and submitted via email to the MCPM Program Director.

The MCPM Level V project includes the following headings:

- **Assessment of Problem:** Clearly describe the quality improvement need/problem in your department/work unit. Include any background information related to the need.
- **Plan:**
 - Identify prioritized tasks, including information on responsible person(s) and changes from the proposed tasks and any unforeseen tasks.
 - Identify resources necessary for completing the tasks and the overall project.
 - Discuss the timeline for completion of tasks, feedback, and evaluation of the project.
 - Describe the performance criteria – how the project will be evaluated.
 - Discuss how the communication flowed in relation to the communication plan.
 - Identify contingency plans, including potential problems and how you mitigated them.
- **Action:** Clearly discuss how you implemented the solution. In this section, you will discuss the actions and activities that you actually did to complete your project. Discuss your planned actions and activities and if there were any deviations from your plan. Include who was involved and how the project changed the environment.
- **Evaluation:** Clearly describe how your project met or failed to meet your expectations and the criteria established in the solution. Clearly identify specific measures, timelines, deadlines, etc. You will also need to include information on monies saved, work-hours saved and/or other fiscal benefits of your project. Please be sure that you compile results from your evaluation tool(s) used to determine the success of your project.
- **Return on Investment (ROI):** Report the impact of actual project benefits and costs to the agency. For additional information on ROI, please see pages 9 -13 of the MCPM Project Handbook.

Project Management Steps

A brief summary of the project management discussion from the MCPM Level III curriculum is provided below as a reminder of the general process. Worksheets for each step are provided in the Appendix. Use of the worksheets is optional and provided for convenience only.

Step 1: Clarification

This step is represented on the Project Proposal Form Section B: Project Purpose.

Get clear on the purpose for the project: what is the desired end result, and who are the stakeholders? Mind-mapping is a project management tool that can help clarify the project purpose and help identify all related tasks (actions, resources, etc.). Once the purpose is clear, identify all stakeholders involved—those served by the project and those who have a vested interest in the project’s success. Capture stakeholder needs and expectations in Step 1 since these contribute to project success.

In the Project Proposal Form Section B:

- Describe the situation surrounding the project in detail, including the stakeholders, their expectations, and the desired impact of the project on them.
- Describe current and historical issues that may have impacted the need for the project.
- Describe the ideal outcome of the project and the actions taken as a result.
- Describe the best strategy for conducting the project.

Step 2: Plan

This step is represented on the Project Proposal Form Section C: Plan.

The first part of developing the plan is to identify the standards against which the project’s success will be measured. Prioritize these. Sequence the tasks identified in mind-mapping, identify the person(s) accountable, identify resources, determine the timeline, and identify potential logjams (barriers) and scope creep. Identify contingency plans in the event of these potential problems that can interfere with your success.

In the Project Proposal Form Section C:

- Describe the performance criteria – how the project will be evaluated.
- Identify prioritized tasks, including information on responsible person(s).
- Identify resources necessary for completing the tasks and the overall project.
- Establish a timeline for completion of tasks, feedback, and evaluation of the project.
- Identify contingency plans, including potential problems and how to mitigate them.
- Describe planned communications to prevent miscommunication among stakeholders.

Step 3: Action

This step is represented on the Project Proposal Form Section D: Action.

Work your plan—this may include capturing the baseline of opinion, quality, etc. before the project change initiative begins. The method of evaluation (survey, questionnaire,

observation, etc.) is conducted in this step. Coordinate tasks, manage resources, communicate progress, evaluate at regular intervals, and modify if necessary. Use the knowledge gained from MCPM classes in Levels I – III.

In the Project Proposal Form Section D:

- Discuss the planned actions and activities, including who is involved and how the project changes the environment.

Step 4: Evaluation

This step is represented on the Project Proposal Form Section E: Evaluation.

Measure actual results against the results that were desired before undertaking the project. Compare to the purpose statement. Identify unexpected occurrences, solicit input from all involved, and determine lessons learned.

In the Project Proposal Form Section E:

- Discuss how overall project success will be evaluated, including the most important factors that determine whether the purpose has been achieved.
- Identify which evaluation method(s) will be utilized (refer to page 11).
- Describe the competencies that will be developed as concepts covered in Levels I-III are applied to the workplace.

Step 5: Return on Investment (ROI)

This step is represented on the Project Proposal Form Section F: Return on Investment.

Report the impact of project benefits and costs to the agency.

In the Project Proposal Form Section F:

- Report the expected impact – the expected ROI, both tangible and intangible.

Return on Investment (ROI) in Level III and V Projects

Nothing is more important to top executives than knowing the true value of a particular project or program. “Show me the money” has become a battle cry for many executives. Return on Investment (ROI) is a way to show credible value in the improvement of a process, program, or initiative. Armed with a measure of impact such as ROI, a manager is able to prove value, maximize effectiveness and efficiency, and provide the best outcome possible.

By including ROI in MCPM projects, public sector managers learn to put accountability into practice. No longer is the public sector manager driven by an activity or process paradigm—providing services because they have always been provided a certain way. Today’s public sector managers can show—and improve—the impact of the services provided by focusing on results. Examples are listed below.

Activity/Process-Driven Paradigm	Results-Driven Paradigm
Focus on how things are done rather than business needs	Project linked to specific business needs
Focus on “the way we do things”	Quality of service is assessed
No effort to prepare for achieving results	Expectations about results clearly communicated
No effort to prepare the work environment to support project	Environment prepared to support project
No thought of building partnerships	Partnerships established with key stakeholders
No measurement of results	Measurement of results
Planning and reporting are input-focused	Planning and reporting are outcome-focused

ROI in the public sector may measure tangible or intangible impacts resulting from a project. While there will be tangible benefits that can be measured (whether monetary or not), there are quite often improved or enhanced intangible benefits (not monetary) that should be included, such as:

Adaptability	Awards	Brand awareness
Career-mindedness	Collaboration	Communication
Conflicts	Cooperation	Corporate social responsibility
Creativity	Culture	Customer complaints
Customer response time	Customer satisfaction	Decisiveness
Employee complaints	Engagement	Execution
Image	Innovation	Job satisfaction
Leadership	Networking	Organizational climate
Organizational commitment	Partnering	Reputation
Resilience	Stress	Teamwork

Examples of Tangible and Intangible ROI

1. A project to measure improvement in satisfaction ratings (intangible): there is a 45% satisfaction rating before project implementation and a 75% satisfaction rating after implementation. The formula would look like this:

$$\text{Difference in ratings (75\% minus 45\%)} \frac{30}{45} = 67\% \text{ increase in satisfaction rating}$$

With this project the primary return from the survey is not monetary gain, it is satisfaction. However, there are additional considerations for the project. Include how customers/

stakeholders are impacted. Think beyond the satisfaction of those surveyed to the effect that increased satisfaction will have on a division and/or agency. There could potentially be more productive employees, lower absenteeism, and increased engagement – all of which can be represented monetarily (tangible).

2. A project to shorten the timeframe required to perform a service: the service requires 40 days to complete before the project and 32 days afterwards. The formula would look like this:

$$\text{Difference in days (32 days minus 40 days)} \frac{-8}{40} = 20\% \text{ decrease in time required}$$

This project is more easily converted to monetary values. The 20% decrease in time required to perform the service can be multiplied by the average daily wage of the people completing the service. An average daily wage of \$80 for 8 days (the difference in days required) means the savings realized by the project is \$640 per worker. Include how customers/stakeholders are impacted, such as the anticipation of lower bids in the future to perform the same service.

Determining a Data Collection Method

For a return to be calculated, whether tangible or intangible, data must be collected. Collecting data is done in many different ways, and the right method depends on the project and the people involved. Data collection methods and strategies to capture the effects of a project are depicted in the next two tables.

Data Collection Methods for Evaluation and Application to ROI

Method	Application
Surveys/ Questionnaires	<ul style="list-style-type: none"> • Determine the degree to which employees have utilized various aspects of an initiative. Responses are often developed on a sliding scale and usually represent attitude-related data. • Uncover specific applications of initiatives/programs (onboarding, wellness, or any other initiative targeted for employees). Employees provide responses to a variety of types of open-ended and forced-response questions.
On-the-job Observation	<ul style="list-style-type: none"> • Captures actual skill application and use. • Observations are particularly useful in customer service initiatives and are more effective when the observer is either invisible or transparent.
Post-program interviews	<ul style="list-style-type: none"> • Determines the extent of program effectiveness. • Allows for probing to uncover specific applications.
Focus groups	<ul style="list-style-type: none"> • Determines the degree to which a group of employees is involved in the program and the extent to which the program effects day-to-day operations.
Program Assignments	<ul style="list-style-type: none"> • Employees complete the assignment on the job utilizing components or initiatives of the program.
Action Plans	<ul style="list-style-type: none"> • Developed for a program and implemented on the job. • A follow-up provides evidence of program success.

Performance Contracts	<ul style="list-style-type: none"> Developed where the employees, managers, and executives all agree on specific outcomes of the program.
Follow-up Sessions	<ul style="list-style-type: none"> Captures evaluation data as well as presents additional learning material.
Performance Monitoring	<ul style="list-style-type: none"> Useful when various performance records and operational data are examined for improvement.

Strategies to isolate the effects of the project

Strategy	Type of Effect Isolated
Control Group	<ul style="list-style-type: none"> One group participates in the program while a similar group does not. The difference in performance of the two groups is attributed to the program.
Trend Lines	<ul style="list-style-type: none"> Used to project the value of specific output variables, if the program has not been undertaken. The projection is compared to the actual data after the program, and the difference represents the estimate of the impact.
Strategy	Type of Effect Isolated
Forecasting Model	<ul style="list-style-type: none"> Used when mathematical relationships between input and output variables are known. With this approach, the output variable is predicted with the assumption that the program is not conducted. The actual performance of the variable after the program is then compared with the forecast to estimate program impact.
Employees Estimate	<ul style="list-style-type: none"> Employees are provided with the total amount of improvement on a pre- and post-program basis. Asked to indicate the percent of improvement actually related to the program.
Managers Estimate	<ul style="list-style-type: none"> Managers are presented with the total amount of improvement and are asked to indicate the percentage related to the program. Senior management estimates. Managers provide an estimate or 'adjustment' to reflect the portion of the improvement related to the program.
Experts Estimate	<ul style="list-style-type: none"> Because the estimates are based on previous experience, the experts must be familiar with the type of program implementations and the specific situation.
Subordinates Estimate	<ul style="list-style-type: none"> Subordinates of the employees affected by the program assess if other variables changed in the work climate could have influenced output performance.
Extraneous Factors	<ul style="list-style-type: none"> Other influencing factors are identified and their impact estimated or calculated. The unexplained portion of the output is then attributed to the program.
Customer Input	<ul style="list-style-type: none"> Describe the extent to which the components of the program have influenced their decision to use a product or service.

Calculating the ROI

Return on investment is defined as the ratio between the costs and the benefits with a positive ratio indicating a positive impact, or a return on your investment. The benefit/cost ratio is the program benefits divided by the cost. Usually expressed as a percentage, ROI is a measure of profitability that indicates whether or not a product or project is using its resources in a proficient and efficient manner. In formula form, it is:

$$\frac{\text{Gain from Investment} - \text{Investment}}{\text{Investment}} \quad \text{Or, in other words:} \quad \frac{\text{New} - \text{Old}}{\text{Old}}$$

(Proceeds from the product minus the total cost of the product) / Total cost of the product

For example, if the total cost of a product was \$400, and the proceeds received from the product were \$500, you would get the following result: $(\$500 - \$400) / \$400 = .25$ or 25%.

Accountability is at the core of any discussion about value. To maximize value, MCPM projects must align strategically with the employing agency's goals. In the project planning phase, MCPM participants should identify the options available to improve efficiency and/or effectiveness and decide how the project connects to the desired results. The effectiveness of a program can be changed, even if the program itself cannot be altered. When productivity is improved, quality is enhanced, rework time is reduced, and the result is a cost savings.

Reactive Benefits of Calculating the ROI of a Project

- Show contributions of selected projects
- Justify/defend budgets
- Identify inefficient programs that need to be redesigned or eliminated

Proactive Benefits of Calculating the ROI of a Project

- Align MCPM to business needs
- Earn respect of senior management /administrators
- Improve support for projects
- Enhance design and implementation processes
- Identify successful programs that can be implemented in other areas
- Earn a 'seat at the table'

By reporting results, *a greater understanding of the need* for a project is realized by executives. Understanding the need for a project is critical. Defining success will be determined by the extent to which the need is met by the project.

Model Projects

The MCPM Project Evaluator or the MCPM Program Director may recommend an MCPM Level III, IV, or V project as a model project. A model project is one that scores between 90 and 100 as presented on the MCPM project grading rubric, provided in the Appendix. Projects recommended for model status are reviewed by the MCPM Curriculum Committee for final approval and are reported to the MCPM Advisory Board. Once approved, the model project is presented to the MSPB Executive Director, Deputy Director, Workforce Development Director, CPM Program Director, with the participant's supervisor in attendance. Model projects are eligible for presentation at the MCPM graduation ceremony.

Permission will be requested from the participant to use the project as an example for other MCPM participants who are working on projects or to promote the MCPM Program.

Confidentiality

All projects become the property of the MCPM Program and will not be returned to the participant. The reports will be kept in the strictest confidence. To ensure complete anonymity for others, participants should avoid using the names of the other persons in the work environment or should substitute fictitious names.

MCPM Commitment to Honesty

The MCPM Program maintains a zero tolerance policy for cheating and plagiarism. Evidence of cheating and/or plagiarism is grounds for automatic dismissal from the MCPM Program.

Formatting Requirements

All projects must:

- Be written in grammatically-correct standard English.
- Be typed in font size 12 with double spacing and divided into appropriate paragraphs of 3 to 6 sentences. Font face should be easy to read, such as Times New Roman, Arial, Calibri, or Tahoma. Pages should be numbered.
- Be submitted with a title page and an abstract page.

Title Page (Mandatory)

All submitted projects must have a standard title page (see sample in the Appendix of this Handbook) which includes the following:

- Project Title and Subject
- Project Level – MCPM Level III, IV, or V
- Current Date
- Participant’s Name and MAGIC ID Number
- Participant’s Organization/Division and Work Address
- Email Address
- Work Telephone Number

Abstract Page (Mandatory)

The abstract is a one-page summary of the project. ***This summary should be identified only by your MAGIC ID Number*** and should not identify employees of an agency (see sample in the Appendix of this Handbook).

Style

Project reports should be double-spaced on letter-size paper. They may include attachments such as memos, letters, charts, diagrams, manuals, etc. that will help the reader understand the project. Projects that produce an end product such as a manual, newsletter, or training program **must** be accompanied by a discussion of the process used in producing the product. The project should be an expansion of the original proposal noting any changes, deviations, learning outcomes, and applications of MCPM materials. Cite the source of a quote within the text rather than in a footnote or bibliography.

Tense

The correct tone and tense follow Franklin Covey guidelines, as taught in the MCPM Advanced Writing class. The *Franklin Covey Style Guide for Business and Technical Communication* states:

You can and should vary your tenses to reflect the often diverse time relationships of your subject: “Yesterday we analyzed the samples for any traces of zinc ore. We found none. Today, however, we were reexamining the sample when we found two promising

pieces of rock. They have veins like zinc ore, although their color is not quite right. Our report will show the potential presence of zinc.”

Some basic conventions for selecting tenses in technical writing include:

- Record in the past tense experiments and tests performed in the past.
- Use the present tense for scientific facts and truths.
- Use the present tense to discuss data within a published report.
- Shift from present to past tense as necessary to refer to research and prior papers.

Length

Level III and V projects must be 10 – 15 pages in length. Level IV projects must be 5 – 8 pages in length. The project should cover all sections covered on the Level III, IV, or V Grading Rubric and should be clear, concise, and correct.

Proofreading the Project

It is important that projects reflect professionalism and commitment to excellence. Compose the project report as though it will be read by an agency head. **Scores on the Grading Rubric of 0 or 1 from a project evaluator will be automatically returned for revision. Project reports that have errors in grammar, spelling, or punctuation will also be automatically returned for revision.** Project reports will be returned for corrections no more than twice.

Writing experts recommend first checking the content of a report – revising or rewriting the content – before checking for errors in grammar, spelling, and punctuation. Experts also say it is easier to catch errors on paper than on a computer screen, so print the paper and proofread a hard copy before submitting the final project report.

Submitting the Project

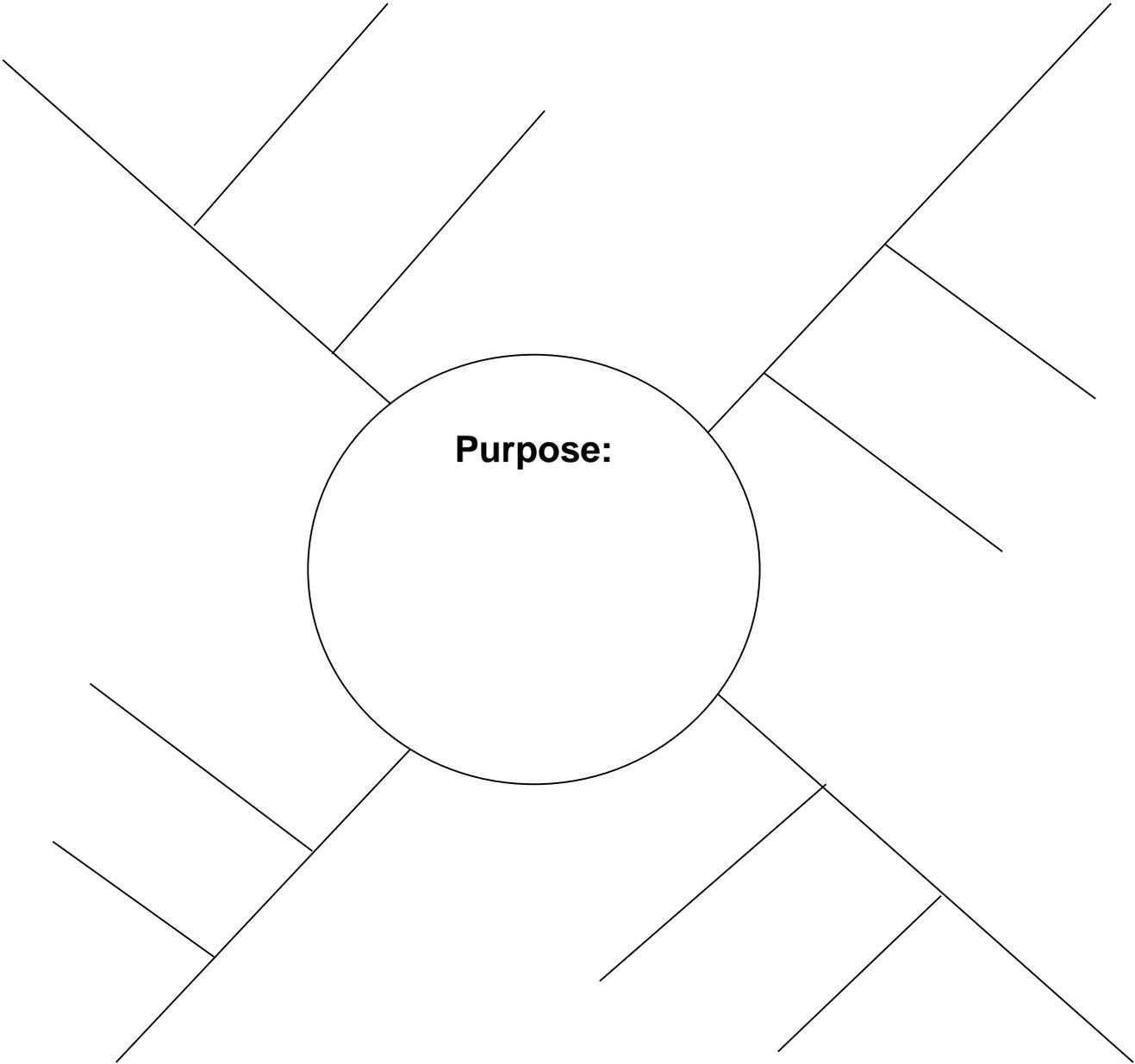
The project report is one document consisting of the title page, abstract page, and the written report. Supplemental information may remain separate from the project report if desired by the MCPM participant. All documents should be scanned and submitted to the MCPM Program Director as an email attachment.

Appendix

Project Management Worksheet Step 1: Clarify

Project Purpose Statement

Mind Mapping



Stakeholders

Stakeholders

Needs/Expectations

Project Management Worksheet Step 2: Plan

Determine Performance Criteria – the standards against which the project’s success will be measured. Prioritize them.

Performance criteria may include such elements as:

- Cost
- Time
- Stakeholder satisfaction
- Quality

Determine the key performance criteria for your change initiative.

Referring back to the mind-map, identify the tasks that need to be accomplished.

Sequence the tasks, person(s) accountable, resources, and determine timeline.

Task (in order of occurrence - sequence)	Person Accountable	Resources	Start Date	Finish Date
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

Contingency Planning: Identify potential problems (barriers, scope creep) and action to mitigate

Potential Problems	Action

Evaluation Criteria for Steps 1 and 2: S-P-I-R-O Model

Specificity

Exactly what is the project intended to accomplish?

Performance

What behaviors will be required? When will they need to occur?

Involvement

What are the needed resources?

Realism

Can it be done? Does it meet the needs of the stakeholders?

Observability

What are the quantitative and qualitative measures of success?

Look back over the purpose statement, map, stakeholder strategies, performance criteria, key tasks, people, resources, timelines, and potential logjams and evaluate your project’s chances for success, using the SPIRO Model. Make any necessary changes before proceeding.

Project Management Worksheet Step 3: Act

- Work your plan
- Coordinate tasks
- Manage resources
- Communicate progress with project team, stakeholders, and management
- Evaluate at regular intervals
- Modify the plan if necessary

Action produces results. In this step, you work your plan by reviewing it at regular intervals and evaluating where you are in each sequence.

You will use the skills developed in earlier CSM sessions such as communication, conflict resolution, delegation, coaching and counseling, change management, group dynamics, meeting management, etc. to help successfully complete each of the steps, paying particular attention to the potential logjams as they occur.

Project Management Worksheet Step 4: Evaluate

Measure the desired results against the actual results achieved:

- Compare to Purpose Statement
- Identify unexpected occurrences
- Solicit input from all involved
- Determine lessons learned
- Determine Return on Investment (ROI)

It is critical to identify what you learned in the course of a project so the success of future projects and the development of the people you work with can be maximized:

- What happened that we did not anticipate?
- What were the effects?
- How close did we come in achieving the Performance Criteria?

If the project required little interaction with others, then rate your own effectiveness in completing each of the four steps (clarify, plan, act, evaluate). If you are debriefing a project with a group, have members rate the team as a whole and discuss the following questions:

- What did we do well?
- What could we have done to make the project go even better?

Tangible and Intangible ROI

$$\frac{\text{Gain from Investment} - \text{Investment}}{\text{Investment}} \quad \boxed{\text{In other words:}} \quad \frac{\text{New} - \text{Old}}{\text{Old}}$$

(Proceeds from the product - Total cost of the product) / Total cost of the product

For example, if the total cost of a product was \$400, and the proceeds received from the product were \$500, you would get the following result: $(\$500 - \$400) / \$400 = .25$ or 25%.

If you gain non-monetary benefits from an investment, you generate intangible returns.

- A new brochure is created to generate increased participation in a program, resulting in better service to customers.
- A policy is revised or created. The desired result could be a decrease in absenteeism or turnover or an increase in employee engagement or morale.

SAMPLE TITLE PAGE

QUALITY SERVICE TO CUSTOMERS

MCPM Level ___ Project

September 1, 2019

MCPM Participant Name
MAGIC ID # 30123456
Email: JaneD@dss.ms.gov

State Service Agency
555 Service Street
Jackson, MS 31111
123-456-7890

MAGIC ID # 30123456

Quality to the customer is a key issue in government today. The State Service Agency contributes to several strategic goals aimed at meeting customer needs. All members of the Service division met to discuss customers, both internal and external, and to develop a list of services provided to those customers. The Service division explored ways that define how well the services are provided. A survey was developed, and the survey instrument was given to customers. The survey included questions concerning the timeliness, completeness, accuracy, and availability of the State Service Agency services and the courtesy and responsiveness of the staff. Survey responses revealed two major areas of weakness. The areas were addressed and changes in related procedures were made. Six months after the changes, customers were surveyed again. Improvement was noted in both areas. Customer needs will be continuously monitored and improvements made to the processes as needed.

Grading Rubric for MCPM Levels III and V Projects
100 possible points • Model project status is possible for projects scoring 90 – 100
MCPM Level III minimum passing score: 70 • MCPM Level V minimum passing score: 80

A. Project Title:

Criteria	Unsatisfactory <i>Return for revision</i>	Needs Improvement <i>Return for revision</i>	Satisfactory	Excellent
B. Project Purpose (for Level 3) Assessment of Problem (for Level 5)	0 points		5 points	7 points
Describe situation surrounding project	No context provided.	Information provided doesn't fit the context for project's purpose. Little or no reference to stakeholders or project management tools.	Context surrounding project provided. Agency mission, stakeholders, and project management tools (i.e. mapping) listed.	Project clearly aligned directly to agency mission, department function, and service provided in participant's area of responsibility. Project management tools (i.e. mapping) described. Stakeholders identified.
Describe the need for project	No need given.	The need(s) described do not correlate to project. Little or no reference to meeting stakeholder needs.	Need(s) for project stated without reference to agency as a whole. Agency mission and stakeholders' needs stated without strategic context.	Need(s) for project clearly defined and tied strategically to agency mission and stakeholders' needs.
Describe the best outcome of project	No desired outcome described for completed project.	Outcome provided is not directly impacted by project. Little or no reference to stakeholders.	Best possible outcome and its effect on the agency and stakeholders listed.	Best possible outcome and its effect on the agency clearly described. Effect on stakeholders clearly described.

Grading Rubric for MCPM Levels III and V Projects
100 possible points • Model project status is possible for projects scoring 90 – 100
MCPM Level III minimum passing score: 70 • MCPM Level V minimum passing score: 80

Criteria	Unsatisfactory <i>Return for revision</i>	Needs Improvement <i>Return for revision</i>	Satisfactory	Excellent
C. Plan	0 points		5 points	7 points
Task Development	No task development provided.	Tasks listed without context to project purpose and/or little to no identification of accountable persons.	Tasks and accountable persons listed but not directly tied back to project purpose.	Tasks sequenced and tied back to mapping in project purpose section. Persons accountable for tasks clearly identified.
Resources	No discussion of resources.	Resources stated without being aligned to project needs.	Resources listed and identified with specific tasks or accountable persons, but not consistently tied to both.	Needed resources clearly identified, tied to specific task(s) and person(s) accountable.
Timelines	No mention of timelines.	Incorrect description or illustration of timelines.	Sequenced tasks include timeframe, but without specific reference to start and finish dates.	Timeline clearly depicts start and finish dates for project tasks, either in paragraph form or as illustration, such as Gantt chart.
Performance Criteria	No reference to performance criteria considered key to the project.	Key performance criteria stated without aligning to measurement of project success (cost, time, stakeholder satisfaction, quality, etc.).	Key performance criteria and measures of success listed (cost, time, stakeholder satisfaction, quality, etc.).	Key performance criteria clearly identified and prioritized as standards against which success of the project is measured (cost, time, stakeholder satisfaction, quality, etc.)
Communication	No mention of intentional communication on project progress.	Communication mentioned without identifying stakeholders and/or accountable persons.	Types of intentional communication (i.e. email updates at regular intervals) listed with stakeholders and accountable persons.	Frequent communication reported with stakeholders and persons accountable for tasks throughout project.
Contingency Planning	No contingency planning.	Partial contingency planning mentioned—either potential logjams (barriers) or scope creep.	Potential logjams (barriers) and scope creep identified in planning phase.	Potential logjams (barriers) and scope creep discussed with stakeholders in planning phase.

Grading Rubric for MCPM Levels III and V Projects
100 possible points • Model project status is possible for projects scoring 90 – 100
MCPM Level III minimum passing score: 70 • MCPM Level V minimum passing score: 80

Criteria	Unsatisfactory <i>Return for revision</i>	Needs Improvement <i>Return for revision</i>	Satisfactory	Excellent
D. Action	0 points		5 points	7 points
Discuss how plan was implemented and who was involved	No application of MCPM class topics during action phase of project.	Incorrect references to MCPM class topics during action phase of project.	Objective application reported through description of coordinating tasks, managing resources, communicating progress with stakeholders and management, and evaluating at regular intervals to determine if modification is needed. For each action item, one MCPM class topic is identified.	Objective application and impact reported through detailed description of coordinating tasks, managing resources, communicating progress with stakeholders and management, and evaluating at regular intervals to determine if modification is needed. More than one MCPM class topic is discussed with action items.
E. Evaluation	0 points	5 points	7 points	
Discuss how overall success is evaluated	No evaluation mentioned.	Incorrect description of outcomes, lessons learned, what went well, or what could have made the project more effective.	Desired outcomes measured against actual results achieved. Objective results are compared to project purpose. List of lessons learned, what went well, and what could have made the project more effective.	Desired outcomes measured against actual results achieved. Impact of objective results is compared to project purpose. Discussion of lessons learned, what went well, and what could have made the project more effective.
F. Return on Investment	0 points	5 points	7 points	
Discuss the impact of outcomes	No mention of impact.	Incorrect description of project's impact to the agency.	Unrealized impact of project's value to the agency; lack of intended improvement even though project completed as planned.	Objective impact of project's value to the agency; effectiveness and/or productivity improved, quality enhanced, or rework time reduced as applicable to project.
Project Report	0 points		20 points	28 points
Clear, concise, correct	Three or more errors in punctuation, spelling, and grammar.		Punctuation, spelling, and grammar is in accordance with Franklin Covey Style Guide. No more than two minor errors.	Punctuation, spelling, and grammar is in accordance with Franklin Covey Style Guide. No errors.

Grading Rubric for MCPM Level IV Projects

100 possible points • Minimum passing score: 80 • Model project status is possible for projects scoring 90 – 100

Criteria	Unsatisfactory <i>Return for revision</i>	Needs Improvement <i>Return for revision</i>	Satisfactory	Excellent
	0 points		10 points	12 points
Assessment of Need/Problem	Need/problem not described or doesn't fit into a function of work unit/department.	Information doesn't fit need/problem. Plan for solving need/problem doesn't fit the work unit/department.	Need/problem clearly described and directly aligned to a function of the work unit/department. Objective plan for solving the need/problem clearly explained and relevant to function of the work unit or department.	Need/problem clearly described and directly aligned to a function of the work unit/department. Objective plan for solving the need/problem clearly explained and relevant to function of the work unit or department. Impact of solution clearly described and connected to agency mission.
Identification of customer(s)	No customers identified.	Need/problem or planned solution not affect internal and external customers.	Internal and external customers described and how the need/problem affects them. Expected improvement for planned solution given.	Internal and external customers described and how the need/problem affects them. Expected improvement for planned solution given. Impact of solution to customers described.
Identification of services	No services identified.	Services provided do not relate to the need/problem.	Clearly describe the services provided in the department/work unit and how they relate to the need/problem.	Clearly describe the services provided in the department/work unit and how they relate to the need/problem. Impact of solution to current and future services discussed.
Application of quality	No quality improvement proposed.	Planned solution not connected to quality improvement and/or impact not expected to work unit.	Clearly describe how the planned solution will improve quality, the impact this will make on the work unit, and what it will mean to the agency.	Clearly describe how the planned solution will improve quality, the impact this will make on the work unit, and what it will mean to the organization. Impact on agency reputation and effectiveness of future services also described.
Criteria for measuring and evaluating quality	No criteria for measuring and evaluating quality.	Evaluation criteria not connected to planned solution and/or need/problem.	Clearly describe the evaluation criteria that will determine if the planned solution solves the need/problem.	Clearly describe the evaluation criteria that will determine if the planned solution solves the need/problem. Potential impact of evaluation on other services also described.
Barriers to solution	No mention of barriers.	One barrier provided.	Clearly describe at least two barriers and the contingency plans to mitigate their impact.	Clearly describe at least two barriers and the contingency plans to mitigate their impact. Discuss the impact these two barriers could make on the planned solution.
Project Report	0 points		20 points	28 points
Clear, concise, correct	Three or more errors in punctuation, spelling, and grammar.		Punctuation, spelling, and grammar is in accordance with Franklin Covey Style Guide. No more than two minor errors.	Punctuation, spelling, and grammar is in accordance with Franklin Covey Style Guide. No errors.