TEMPLATES

FOR MANAGING TRAINING PROJECTS

Willis H. Thomas, PhD, PMP

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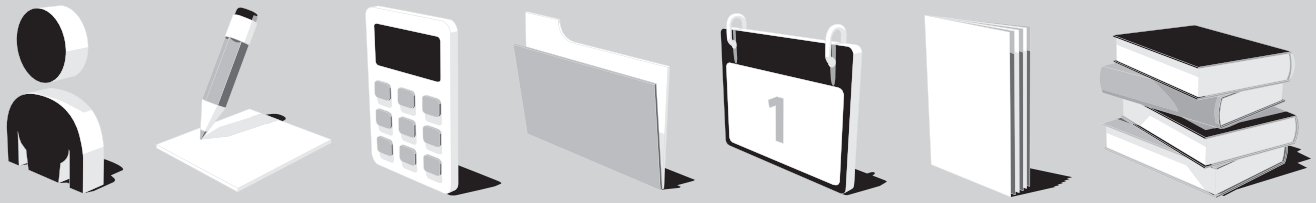

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INTRODUCTION

Are you a talent development professional who coordinates a variety of training projects? Do you experience challenges in maintaining documentation to meet your stakeholders' needs? Can your organization benefit from improved training forms to streamline processes? These are just a few examples in which training projects can benefit from well-designed forms. This is ATD's first book of project management templates and tools specifically designed for training professionals. It builds on the expertise of the two widely respected organizations: Project Management Institute (PMI®) and the Association for Talent Development (ATD). PMI® has created many resources for project managers, certifying hundreds of thousands of professionals worldwide. Similarly, ATD has set the standard for best practices in training and development through providing exemplary content and establishing a competency model for the talent development profession.

It may be helpful to consult a handbook or guide when using these templates. *A Guide to the Project Management Body of Knowledge* (PMBOK® Guide) presents industry-accepted project management terms, definitions, and guidelines. While the PMBOK® Guide is not required to use these templates, it can be very helpful for understanding the application of project management to your job function. It does this by organizing training activities through start-to-finish relationships (Process Groups) and logical categories (Knowledge Areas).

Templates for Managing Training Projects may also serve as a companion to other project management standards, such as PRINCE2 (Projects in Controlled Environments 2), and methodologies, such as Agile project management.

This book not only supports training project management, but also ongoing organizational and business functions, including human resource development functions such as, new hire orientation and professional development. Continually used forms are classified within the area of ongoing operations.

THE EMERGING ROLE OF THE TRAINING PROJECT MANAGER

The role of the training professional is increasingly changing and taking on a project management role that extends beyond training design and delivery into areas that support performance enhancement, process improvement, change management, quality assurance, and measurement and evaluation.

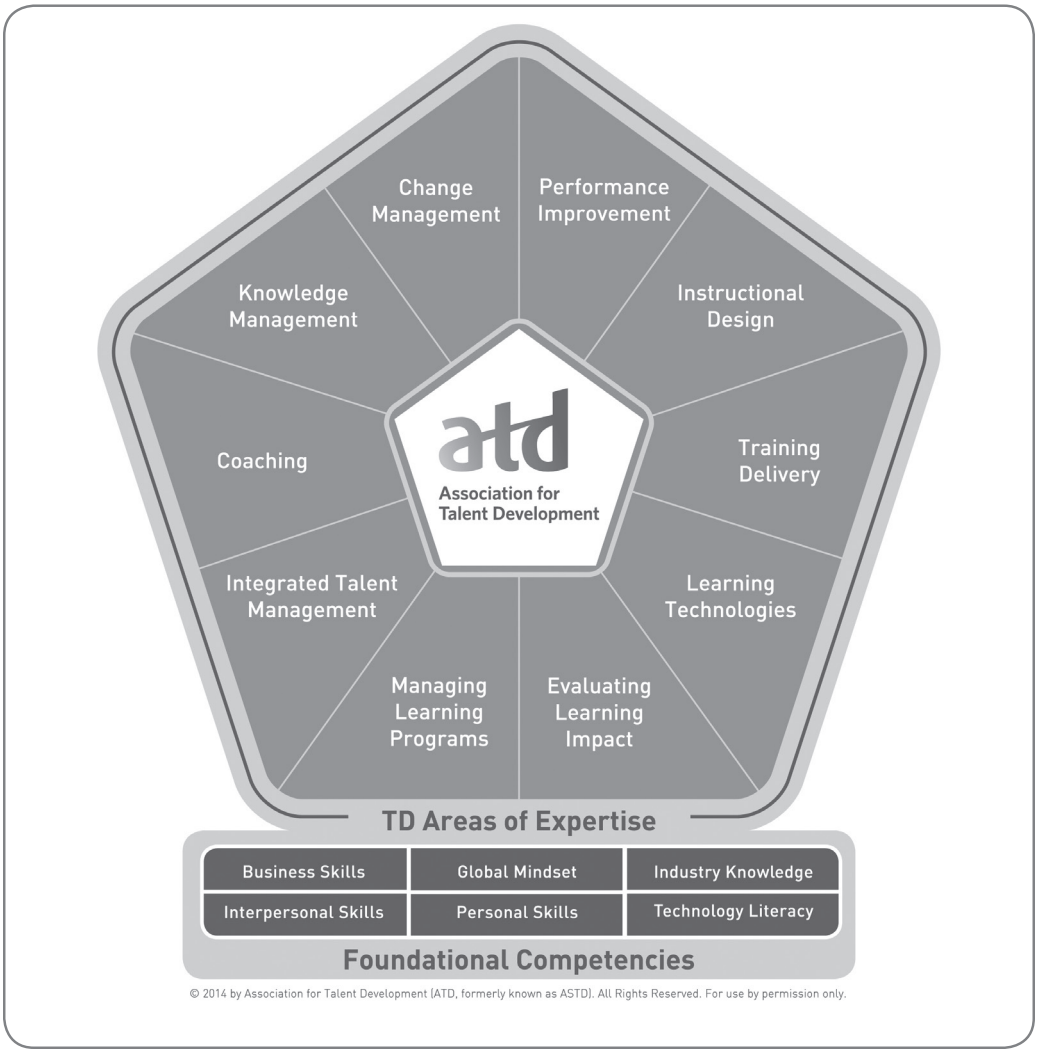
Training project management responsibilities can include authoring and maintaining the training project plan, including managing workflows; facilitating SME input; overseeing approvals; and ensuring effective management of the training project from start to finish. This often means:

- ensuring that competing demands (cost, time, scope, quality, risk, and resources) are properly addressed
- coordinating the efforts of the training project team (SMEs, instructional designers, curriculum developers, trainers, and training administrators)
- supporting training deliverables that have been produced for internal key stakeholders and external regulatory authorities.

The ATD Competency Model provides a framework that can benefit from the effective management of projects and related documentation. Projects are inherent in each area of the competency model—initiatives that are intended

to address specific requirements. For example, in the area of change management, training projects might involve culture change and familiarization with new policies that name educating end-users as a primary task. Learning technologies might involve system validation to ensure compliance. Knowledge management might involve a variety of system implementations that require new ways of thinking, which necessitate learning and performance management as a core focus. Each of the components in the ATD Competency Model involves the development of products, services, or deliverables. In essence, this can be looked at as projects or sub-projects that are temporary, unique, and created for a specific purpose.

FIGURE 1: THE ATD COMPETENCY MODEL



HOW TO USE THIS BOOK

This book is designed to be an invaluable resource to help manage learning and development projects. These forms are knowledge documents that have been conceptualized and enhanced with some input from contributors during the past 20-plus years. These customizable templates are practical for use on training-related projects or ongoing operations. "Training-related" refers to those initiatives that pertain to the full scope of training—from needs assessment to instructional design, from initiating a new training initiative to managing training operations.

To optimize the use of these forms consider the following:

- Why do you really need training forms? Do you need forms to track results, to show accountability, for formal documentation, or for other related concerns?
- Which forms do you need? Do you need all of the forms or just specific ones for particular projects based upon the size and complexity?
- When do you need the forms? Do you need specific forms at the beginning of the project and other forms throughout the project, or do you prefer utilizing the majority of the forms at the end of the project for record-keeping purposes?
- How will you use the forms? Will these be used as printed forms or electronic documents?
- Will they be used with the project team only or with stakeholders?
- Why do you need the form? Are there regulatory or compliance requirements that you need forms to track?
- Who will initiate, maintain, or approve the forms? Will the data administrator be responsible for the forms or is the training manager ultimately accountable for training documentation?

To make this book user friendly a glossary of terms that applies specifically to training project management and ongoing operations is provided at the end of this

book. This will help you to develop a common language within your organization and ensure that everyone understands the concepts of training project management.

Whether you are a project manager who has responsibilities for training or a training and development professional who is responsible for managing training-related projects, you will find this guide useful.

The forms are organized by Knowledge Area (subsets of project management), according to the PMBOK® Guide, 5th edition:

1. **Project Communications Management** includes the ways in which we interact with people involved in the project and distribute information to them.
2. **Project Cost Management** includes the financial aspects of training projects, including the financial expenditures and budgets.
3. **Project Human Resource Management** includes onboarding and off-boarding of people involved in the project.
4. **Project Integration Management** is when all components of the project are brought into alignment through integrated change control, beginning with the business case and oversight.
5. **Project Procurement Management** includes deciding which external vendors will provide the solution for the training project.
6. **Project Quality Management** requires assurance that the project meets stakeholder expectations as outlined.
7. **Project Risk Management** addresses uncertainties and unknowns, and helps you come up with a plan of action to reduce their impact in the event they occur.
8. **Project Scope Management** maintains focus on the project so that the boundaries and parameters are in line with only the work that needs to be produced.
9. **Project Stakeholder Management** includes the identification and analysis of people involved in the project with respect to their level of power and interest in the training project.
10. **Project Time Management** is the duration it takes to complete a training project and the sequence of activities that needs to occur for it to be successful.

There are 47 project management processes identified in the PMBOK® Guide, grouped into 10 Knowledge Areas. According to PMI®, "A Knowledge Area represents a complete set of concepts, terms, and activities that make up a professional field, project management field, or area of specialization." It is recommended that you invest some time in becoming familiar with the PMBOK® Guide as the standard for project management. Browse it to see how the Knowledge Areas intersect with the Process Groups: Initiating, Planning, Executing, Monitoring/Controlling, and Closing.

Another popular reference for project management is PRINCE2, which is considered the second most popular project management standard in the world.

PRINCE2 focuses on seven principles:

1. continued business
2. learn from experience
3. defined roles and responsibilities
4. manage by stages
5. manage by exception
6. focus on products
7. tailor to suit the project environment.

There are also seven themes:

1. business case
2. organization
3. quality
4. plans
5. risk
6. change
7. progress.

While there are some inherent differences between these two project management standards, they are consistent in the guidelines and recommendations set forth in terms of how project management can be successfully carried out and

the role of the project manager. The forms provided in this book can be adapted to work with both the PMBOK® Guide or PRINCE2. The PMBOK® Guide and PRINCE2 complement each other in the practical approaches that are recommended for project management.

In terms of those pursuing training and certification using these standards, PMI®, which publishes the PMBOK® Guide, has more than 500,000 people who have achieved certification, using the PMBOK® Guide as a foundation. This number is significantly higher than PRINCE2. For this reason and others, this book of forms follows the PMBOK® Guide as an easy to adapt to framework.

For those training professionals who will reference the PMBOK® Guide, you should pay particular attention to how each Knowledge Area coincides with each Process Group. This can be thought of in general terms as the competing demands you will experience when dealing with training projects. Examples include time (schedule), risk (unknowns), and cost (budget). The training forms included in this book can help you to document and develop strategies to address these issues.

SPECIAL CONSIDERATIONS WHEN USING THIS BOOK

Keep in mind that while there are many forms in this book, streamlined documentation is nearly always appreciated. However, regulatory or compliance requirements may necessitate robust documentation. In this case, these forms can support seamless administration within a project management office (PMO). The purpose of a PMO is to maintain forms to simplify and standardize project management. At the end of the day, it is all about improving documentation and related processes throughout your organization.

Sometimes change is not easy. To acclimate your colleagues to the idea of better project documentation, consider holding an orientation meeting to discuss the benefits of standardizing forms and using the same templates. Many will embrace the idea, while others may need convincing about the advantages. They may be initially resistant and prefer to continue doing things their own way. It is important to help these individuals consider the many benefits of standardization. Some organizations may find it preferable to do it a little at a time, while others may find it better to implement the new forms all at once. The benefit of implementing all the forms at once is that it can provide a fresh start for the new and improved method of managing training documentation. The advantage of doing it over time is that it helps people adapt to the new system more slowly and can ease the change management process. Whatever path you decide to take, it is important to get buy-in from key stakeholders.

As you use this book to improve and maintain your training documentation, it is important to avoid:

- Slowing down current processes that will not benefit from additional training related forms.
- Over-customizing forms so that they lose all original context. In this case, it may be better to create a new form entirely with another name.
- Being too rigid; the forms are templates and may need a little customization to fit your exact needs.

Consider a real world example. Your team is working on a new project. You load all of the forms onto a server with little instruction because you are a very busy training manager. People may begin using the forms and find them useful, but some could be customized without your approval. To control modifications of the forms, develop a job aid that addresses training documentation and the appropriate use of the forms. Keep track of the forms that are being modified and

help with revisions when practical. It is important to keep in mind the problems that can occur if there is no oversight of the training documentation. Even with excellent resources, poor overall management can result in out-of-date forms and poor record keeping. The solution to this issue is to ensure that someone is accountable for training documentation.

TARGET AUDIENCE

Templates for Managing Training Projects is written for those who have roles and responsibilities in training and development and those who manage training projects. This includes a wide variety of job titles and functional areas, such as:

- learning and development professionals who are typically responsible for the maintenance of training forms
- project management professionals who may utilize the forms for tracking training deliverables
- quality operations staff who may use the forms for conducting training audits
- human resources staff who can use the forms for tracking performance improvement
- procurement professionals who may use the forms to keep up-to-date on vendor communications as it relates to the creation of training programs
- legal departments that may express interest in training documentation to ensure training compliance.

In addition to those who use the forms, there are many people who have supporting roles who will receive these forms, such as curriculum developers, instructional designers, training data entry, and administration. Almost anyone, and sometimes everyone, may become involved in training and development initiatives as a facilitator or recipient. Training touches every department and

function and can be situated cross-functionally within the organization. In addition consultants or those who have small training functions can benefit from the use of these training forms.

TRAINING PROJECTS VERSUS ONGOING OPERATIONS

There is some disagreement as to what differentiates a training project from an ongoing training operation. In this book, training projects have a beginning and an end, are unique, and serve a specific purpose to produce a product, service, or result. A product could include an instructor guide, a service could include an instructor-led training session, and a result could be the test scores of participants who took the training. Ongoing operations are tasks that emerge from training projects; are the result of a training project, are in some way connected to a training project; or are continuous, repeated, or identical. Ongoing operations may include the delivery of the same training program to different audiences.

Some organizations initiate a training project that transitions to an ongoing operation. For example, the training project could be developing a training program to assist customer service representatives with using the new customer relations management (CRM) system, while an ongoing operation could be updating the CRM training to reflect system changes. They will then submit a request to enhance this ongoing training operation, but refer to it as a project. It is not the purpose of this book to debate the iterative nature of project management or the complex relationships that exist between project management and ongoing operations. Rather it is the intent to improve the organization, management, and documentation for training in both training project management and ongoing

operations. These forms are cross-functional and can be used for training projects or ongoing operations; for example, by allowing the learning and development professional to coordinate training functions through the use of the forms.

IT'S TRAINING IN THE PUREST SENSE OF THE WORD

Some people are sensitive to the use of the word training (in part due to its perceived overuse as a category). As a result, they shy away from referring to themselves as conducting training or being trainers. They may use other terms to describe their function (learning and development, organization development, or facilitation). We could agree perhaps that training is what we perform and learning is what people do. That said, we will use "training" and "training-related" as the overarching terms to refer to training project management and ongoing operations. This can include:

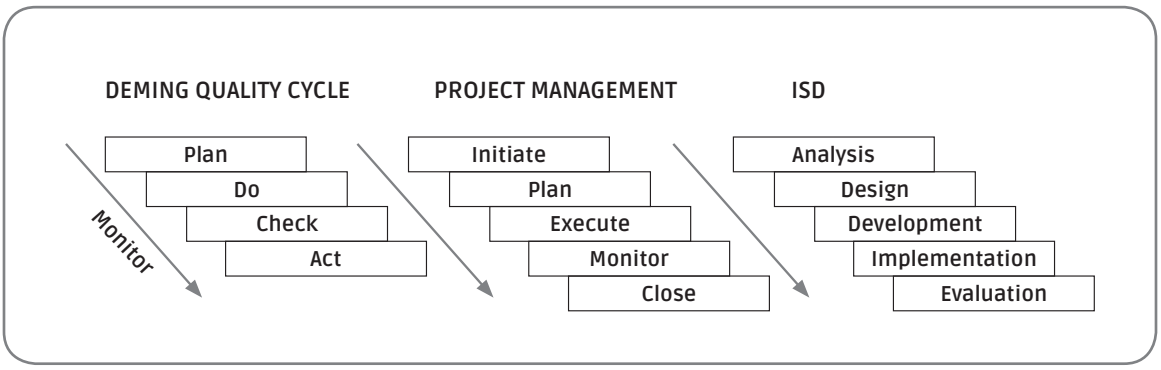
- needs assessment
- instructional design
- curriculum development
- learning management system implementation
- media creation
- training measurement/metrics
- instructor-led training
- policy and procedure development.

A WIDER VIEW OF PROJECT AND IMPROVEMENT CYCLES

There are a variety of project and improvement cycles that include training. It is important to understand these approaches when using the forms. This section

takes an integrated view of training using various methodologies and approaches. These are for illustration purposes only and it is not a linear relationship. As most trainers know, during the initiating or analysis phase you're also planning your schedule, costs, quality measurement, risk analysis, communication strategy, measurement, closing, and so on, as you define your scope. So while the forms are categorized into Knowledge Areas, there may be some instances in which the forms need to be reclassified to fit specific categories. For example, you may find that combining the Cost and Procurement Knowledge Areas into a single category called Expenditures is more desirable. Tailor the forms to your specific requirements to improve their utility.

FIGURE 2: EVOLUTION FROM QUALITY MANAGEMENT TO ISD



The Project Management Connection to Instructional Systems Design and Quality Improvement

Can instructional systems design (ISD) benefit from the experiences and the best practices found with project management templates? Furthermore, what about the lessons learned within the quality movement? The first transition is an easy one, because, at one level, the traditional ISD model is in fact a project management model. In addition, it captures and codifies a number of best practices from everyday experiences.

For example, the classic ISD model that was created in the 1970s for the Training and Doctrine Command of the U.S. military can be traced back to the best training practices that evolved from the various Job Corps projects in the 1960s. The answer to the second question, the importance of the TQM movement in shaping and influencing the classic ISD model, is similar because they all share the same parent-child relationship. The modern quality movement can be directly traced back to the 1950s with Deming's plan, do, check, act cycle; the continuous cycle was repeated again and again with a monitoring function until a defect-free product or service emerged.

Adapted from the *ASTD Handbook for Workplace Learning Professionals*.

From the perspective of the PMBOK® Guide, projects are viewed from the perspective of Process Groups:

- Initiating: Determine the project type and scope.
- Planning: Plan the amount of time, cost, and resources required to adequately estimate the work.
- Executing: Begin the work of the project, including management of resources.

- Monitoring and Controlling: Manage oversight, continuous improvement, and lessons learned.
- Closing: Complete formal acceptance of the project, archiving documentation, and final evaluation.

Some organizations have adopted a Lean Six Sigma environment and as a result they may adhere to DMAIC principles. During the Monitoring and Controlling phase of a project, there may be some concern for quality and DMAIC may be engaged. This is a process improvement methodology that is commonly (but not exclusively) associated with Six Sigma.

- Define: Outline the business issues, objectives, resources, scope, and timeline. This information is captured in the project charter.
- Measure: Set current levels as the basis for improvement by collecting data.
- Analyze: Verify and choose a root cause for elimination.
- Improve: Determine, test, and implement a solution to address the issue.
- Control: Focus on the sustainability of the solution.

During the Improve phase of DMAIC, a training intervention, such as a job-aid or e-learning module may be defined. This will require instructional design and thus we might look at using ADDIE:

- Analysis: Explore training and development objectives and determine gaps.
- Design: Define the learning objectives, content, delivery method, and assessments.
- Develop: Create the content (storyboards, slides, graphics, participant guides, e-learning, and so on).
- Implement: Pilot and roll out the training.
- Evaluate: Measure the effectiveness and efficiency of the training deliverables.

Considering that evaluation is an iterative process, in the final stage of ADDIE, we may consider Kirkpatrick's Four Levels of Evaluation:

1. Reaction: Did they like the training?
2. Knowledge check: Did they learn from the training?
3. Behavior change: Were there changes in performance?
4. Results: Did training have an effect?

If the focus is on Level 4 Results, then we may address the impact to the organization. Quite often, we look to measure training effectiveness or efficiency with respect to resource utilization. There are seven categories of resources in this book: people, money, systems, facilities, equipment, materials, and supplies.

MANAGING AND ORGANIZING YOUR DOCUMENTATION

Maintaining training forms is much easier if it is an organized process. There are two ways to maintain training forms—electronic and paper-based. Electronic systems can use completed and saved documents, completed forms converted to PDF, forms in either format saved in a database, multi-user collaboration on the intranet or cloud, or scanned copies of forms that have been filled out by hand. Paper-based systems are generally hard copies of completed documents in a filing system.

The design of this book provides an option for both electronic and paper-based methods. The forms included in this book can be photocopied and filled out from the physical book or downloaded as PDF forms from the book's website at td.org/books. Organizations should begin by defining a folder structure for the documents that will be created. This will be different if physical filing cabinets are used instead of shared file folders on computer hard drives (or servers). Be sure to adhere to good business practices and good documentation procedures

regarding records management, especially if there are compliance or regulatory requirements for document archiving and retrieval.

Where practical, here are some helpful suggestions you may want to consider when organizing training forms:

- Create a main folder; for example, Training Project Management Forms.
- Create sub-folders within each folder; for example, one for each category, including Project Communications Management.
- Within each subfolder create a timeline folder; for example, january_2014.
- Avoid leaving spaces in folder names, because this can sometimes cause hyperlinks to break. Instead use underscores to separate logical attributes of labels. For example, January_2014.
- Use caution when defining labels. Some servers look at the same spelling as three different words; for example, January, january, and JANUARY are not the same.
- Be careful with special (unique) characters. People who use tablets and smartphones may have a limited keyboard that does not display special characters.
- Keep the length of labels to a reasonable number of characters.
- Avoid uncommon abbreviations, which may not be understood by the users accessing the files.
- If using numbers and letters, use intuitive patterns.
- Alphabetize folders or numerically sequence.
- Minimize the number of subfolders to reduce extensive drilling down to access the desired file.
- Consider putting an index with instructions in main or subfolders that helps describe contents of files within that folder.
- Files within folders should have a creation/revision dates.
- Any files that use encryption for security reasons should be noted; for example, Training_Form_(Secure).

- If files are opened and re-saved, but not modified, they will have a different system date. Users should be informed that the system date and revision date are two different things.
- Change the revision date when you make any revisions to a TPM form.
- A revision history should be available on the form itself or in an indexed file in the same folder or subfolder for tracking purposes.

THE TRAINING PROJECT PLAN

A training project plan typically consists of a series of related plan documents that describe how each phase of the training project will be managed. It may include how communications will be handled, budgets controlled, risks addressed, and time accounted for in terms of resource utilization. There is no pre-defined length to a training plan. It will vary depending upon the circumstances.

A training project plan is unnecessary when:

- The training-related tasks are short, simple, and informal.
- There is no perceived value to having a training project plan.

A training project plan is beneficial when:

- Training is a formal process.
- Dynamically changing educational needs exist; for example, the use of Agile project management methodologies for software development requires training programmers on business processes.
- Regulatory compliance, and audits of the training system and records have identified gaps that now require formal procedures to train employees.
- There are complex systems—for example, SAP, Oracle, PeopleSoft ERP systems—that require detailed storyboarding.
- Vendor-managed programs and outsourced training and development programs necessitate longer development cycles.
- The project includes collaborative initiatives to develop programs that benefit multiple organizations for the purpose of training groups of people, such as certification programs.

FIGURE 3: TRAINING PROJECT PROCESS MAP

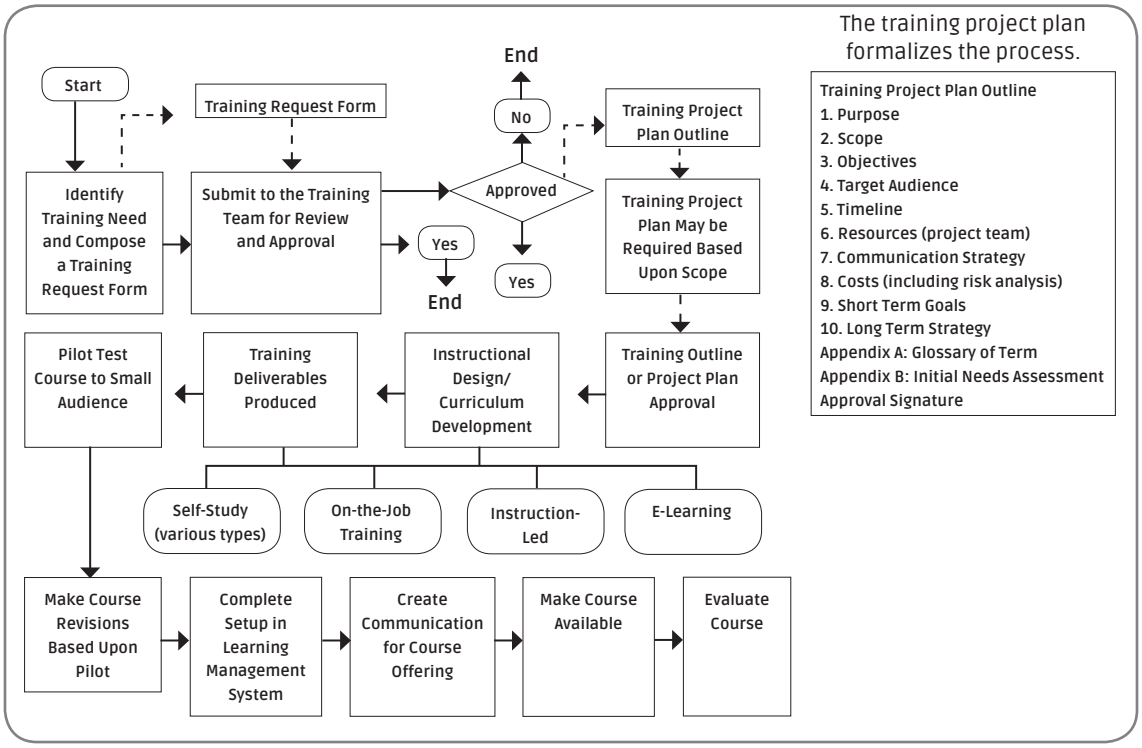


Figure 3 above represents the detailed steps that may be required in a large-scale or complex training project plan. Simpler versions of a training project plan may include only a training request, which is followed by training approvals (from management) and creation of deliverables; for instance, instructor-led training.

Training project plans should take into special consideration:

- Cost: Training-related expenditures, including LMS implementation and travel costs. It may also be appropriate to include costs associated with risks.
- Quality: The degree to which the project fulfills requirements determines quality. For example, a job aid may work well for training people on the manufacturing floor for just-in-time information needs, but might not be suitable for addressing long, step-by-step procedures.

- Resources: Include people, budgets, facilities, systems, equipment, materials, and supplies required on a dedicated, temporary, and pooled resource basis.
- Risk: Training is impacted by risk when some aspects are uncertain. Those involved in risk management identify and plan options in order to reduce or eliminate the potential risk. An example might include a key resource accepting a different position at another company.
- Scope: Define of the target audience and parameters of the project.
- Stakeholders: Internal or external people impacted by the training deliverable either using it or supporting it.
- Time: To measure time create duration estimates for training-related activities.

GETTING STARTED

By this point, you may be anxious to use the forms. The following is some quick start information:

- If you are currently using training forms, compare your existing forms to those in the book.
- Some of these forms are situation-specific. For example, there are some forms that are focused on training compliance and the most appropriate use of these forms may be during an internal audit.
- The forms may be used in hard copy or electronic format.
- Some of the forms have been pre-populated with examples to suggest ways in which these fields may be completed.

The sections align with the PMBOK® Guide and begin with the project plan for each knowledge area. The forms contained within the knowledge areas are listed in the plan document under the following headings.

1. Training Communications Management: Who gets what information, in what form, and when?
2. Training Cost Management: What are the expenditures, how are they paid for, and who is paying for them?

3. Training Human Resource Management Plan: How are people acquired and released from the project?
4. Training Integration Management: How is the project viewed holistically to ensure all the required work is being performed?
5. Training Procurement Management: How are make versus buy decisions made and what is the process to source for external resources?
6. Training Quality Management: How do we know that the product of the project is meeting stakeholder expectations?
7. Training Risk Management: What solutions are put in place to avoid, accept, transfer, or mitigate unknown circumstances that could potentially affect the project?
8. Training Scope Management: What metrics can be put in place to ensure that only the work required is performed and that additional requests are appropriately monitored through approval processes, such as change controls?
9. Training Stakeholder Management: When aligning with those who have a vested interest in the project, what can be done to ensure good working relationships?
10. Training Time Management: How do we determine the timeframes, establish milestones, and determine durations for project tasks?

As you look to add, delete, or revise forms, please consider using this framework to support training documentation.

MULTI-USER INPUT TO FORMS

An emerging and popular use of training forms is to have multiple users view and provide input into the form simultaneously. This can be done in a number of ways using screen-sharing software or holding a web-based conference. There are cost-effective options (or in some cases free of charge) multi-user platforms with real time updates that embrace collaboration—Google Drive (free or paid) and MS Office 365 (paid) are two. Alternative screen sharing options include Skype and Google Hangouts (free and paid). Whatever you decide, it is important

to realize that technology is continually changing. Use these ground rules to help the project go more smoothly:

- Set aside an adequate amount of time to design the form.
- Ensure the person who will be entering the information into the form has great listening skills.
- Make changes now to reduce the number of revisions that have to be made at a later time.
- Minimize the use of complex graphics and illustrations.
- Standardize the form so it has a consistent look and feel.

INTEGRATING PROJECTS

Project Integration involves identifying, defining, combining, unifying, and coordinating activities across Initiating, Planning, Executing, Monitoring and Controlling, and Closing (the five project management Process Groups).

Team members must work closely to keep the project well integrated across the activities and functional areas of the organization. This requires attention to detail and focus on all aspects of the project. Experience is an important factor to project oversight. Empowering the right people to do good work is an important aspect of leadership.

Lessons learned can be conducted at the end to determine:

- the return on investment of a training program by tracking expenditures forms
- results and level of satisfaction with a course through an evaluation form
- accountability—who did what by tracking with forms.

Lessons learned can be conducted formatively to address:

- process improvement, by looking at how to better coordinate instructor schedules through forms
- change management, by documenting change requests with forms
- business continuity, by looking at backing-up electronic training documentation with forms.

The Training Issues Log captures concerns for the overall training project and documents those concerns for training-related events. Examples include:

- availability of facilities
- requirements for developing content in more than the native language
- enabling additional training platforms or connectivity to support business continuity requirements
- emerging requirements for blended learning solutions, when additional ways of delivering the same content in different ways becomes highly desirable.

The training business case, research, and supporting documentation are used during the creation of the project charter and serve as the foundation for the project and ongoing operations. For example, a key stakeholder initiates a great idea for a new training program, but does not know how to justify the $100,000 it will cost to fund the project. He works in conjunction with a project manager with experience in T&D who reviews case studies on similar projects and determines the return on investment for the organization. This business case is presented to senior management who become the sponsors for the project.

Forms help the integration process in many ways by:

- ensuring there is a valid business case for embarking upon a training project
- verifying that all the work of the project is coordinated
- confirming that the necessary processes are in place to manage change.

The PMBOK® Guide says Project Integration Management includes the processes required to identify, define, combine, unify, and coordinate the various processes and project management activities within the project management Process Groups.

To manage training project integration you must:

- Develop a project charter.

- Develop a project management plan.
- Direct and manage project work.
- Monitor and control project work.
- Perform integrated change control.
- Close the project or phase.

The integration forms in this section include:

- Training Integration Management Plan
- Training Change Request
- Training Formal Acceptance of Deliverable
- Training Issues Log
- Training Project Charter

Training Integration Management Plan

Project Title: _____

Project Description:

Developing the project charter will involve:

Developing the project management plan will involve:

Directing and managing project work will involve:

Monitoring and controlling project work will involve:

Performing integrated change control will involve:

Closing the project or phase will involve:

Notes:

Prepared by: _____ Date: _____

Contact Information: _____

Project Manager: _____ Project Due Date: _____

Training Change Request

Project Title: _____

Project Description:

Description of change:

Reason for change:

Affect if change request is approved or not approved:

Change control number or configuration management details:

Decision:

☐ Approved ☐ Denied ☐ Pending ☐ Other _____

Notes:

Approvers

Name	Title	Signature	Date (mm/dd/yyyy)

Notes:

Prepared by: _____ Date: _____

Contact Information: _____

Project Manager: _____ Project Due Date: _____

Training Formal Acceptance of Deliverable

Project Title: _____

Project Description:

Description of deliverable(s):

Agreed upon acceptance criteria:

Approval Signatures

Date	Name	Title	Deliverable

Notes:

Prepared by: _____ Date: _____

Contact Information: _____

Project Manager: _____ Project Due Date: _____

Training Issues Log

Project Title: _____

Project Description:

Issues Tracker

Date	Concern	Status (R, Y, or G)	Impact on Objectives (H, M, or L)	Person Responsible	Due Date for Resolution

Notes:

Prepared by: _____ Date: _____

Contact Information: _____

Project Manager: _____ Project Due Date: _____

Training Project Charter

Project Title: _____

Project Overview:

Project Purpose:

Project Description:

Project Objectives:

Project Goals:

Project Assumptions:

Project Constraints:

Project Critical Success Factors:

Notes:

Prepared by: _____ Date: _____

Contact Information: _____

Project Manager: _____ Project Due Date: _____