

PJ Enterprises

CATALOG PRODUCT TRAINING PROJECT DOCUMENTS

PREPARED BY GROUP 3

**PJ ENTERPRISES
712 SOUTH BROADWAY STREET
MENOMONIE, WI 54751**

DECEMBER 18, 2011

PJ Enterprises

Table of Contents

Project Scope Change Management Plan	3
Project Status Report.....	5
Employee Expense Report	12
Employee time Card.....	13
Change Request Form	14
Procurement Plan.....	15
Invitation to Bid	21
Project Management Glossary	32

PROJECT SCOPE CHANGE MANAGEMENT PLAN

Project Scope Change Management Plan	
I. Purpose	
<p><i>The purpose of the Scope Change Management Plan is to:</i></p> <ol style="list-style-type: none"> 1. Manage and control scope change during the Implementation Project. 2. Ensure that the project is implemented on time and within the approved budget and scope. 3. Evaluate and prioritize all changes to the project implementation plan at the institutional level. 4. Provide a process for implementing change required by the system. 	
II. Goals	
<p><i>The goals of the Scope Change Management Plan are to:</i></p> <ol style="list-style-type: none"> 1. Manage the handling of gaps between institution processes and procedures and the baseline system being implemented. 2. Align efforts and institution resources to meet institutional needs. 3. Help limit modifications to the baseline system. 4. Allocate spending on 3rd party auxiliary systems. 5. Encourage process and policy change before system modifications. 6. Adhere to contractual obligations for change orders with vendor. 7. Encourage communication of project changes as appropriate. 	
III. Scope of Change Requests	
<p><i>The following change requests will be addressed by the Scope and Change Management Plan:</i></p> <ol style="list-style-type: none"> 1. Modifications to software. 2. Acquisition of 3rd party software. 3. Changes to contracted professional services (e.g. additional consulting visits). 4. Scope (includes modules, data conversion and migration, interfaces, etc.). 5. Milestone dates, including interim milestones and major go-lives. 6. Additional project spending (hardware, training, conferences, etc.). 7. Functionality required by policy changes at the university and/or external mandates. <p><i>The following change requests will NOT be addressed by the Scope and Change Management Plan:</i></p> <ol style="list-style-type: none"> 1. Policy / process changes. May occur as a result of a change request. 2. Requests for modifications to current systems not to be replaced. Changes may occur as a result of integration, migration, and conversion decisions. 3. Re-allocation of contracted professional services hours. May occur due to a change request, but specific requests to re-allocate service hours will not be accepted without justification based on the change. 4. Changes to existing systems. 	
IV. Change Request Process	
<ol style="list-style-type: none"> 1. Team Lead initiates Change Request by completing the Change Request Information section on the Change Request Form and submitting to Project Managers. 2. Project Managers review with Team Lead; identify needed information and next steps to complete; enter into Change Request Log. Project managers communicate and coordinate (as needed) with appropriate personnel to gather needed information. 	

3. Project Managers prepare and submit Change Request Impact Analysis section and submit to the Change Management Team.
4. Institution Implementation Team receives weekly updates of pending change requests and provides input as needed / requested.
5. Change Management Team approves/denies change request, provides Final Recommendation on the Change Request Form and advises project Managers.
6. If appropriate, forward for review and disposition.
7. Project Managers communicate the decision to:
 - a. The Team Lead making the request of the Change Review Team decision.
 - b. Implementation Team.
 - c. All Project Managers and appropriate interested parties.
 - d. Makes appropriate entries into the Change Management Request Log.
8. Modify Implementation plan and documentation as needed to incorporate approved change.

V. Roles & Responsibilities

Team Leads	Originate change requests based on implementation needs using approved forms and communication processes. Requests from team members should be discussed with the appropriate Team Lead prior to submitting an official change request.
Project Manager	Facilitate the completion of change requests and information gathering. Work directly with vendors (e.g. services or software estimate) and with appropriate IT personnel, administrative and academic offices (e.g. workarounds, changes to policies and procedures) to collect information needed to complete the request.
Implementation Team	Receive updates of completed change requests pending approval. Provide input as needed/requested.
Change Review Team	Evaluate, allow or disallow change requests based on the submitted information. Call upon the Project Manager and Team Leads to provide additional information as needed to complete review. Escalate resolution to Executive Steering Committee as needed.

VI. Notes

Requests resulting in changes to the vendor contract require approval from the Project Sponsor.

- No changes to the contract should be acted upon or conveyed as an approved change until we have verified that we are in compliance with the original contract.
- Changes to software, budget, or contracted hours will be reviewed, managed and approved by the Project Manager.
- First priority will be given to change requests for mission-critical functions and/or services. Other criteria for evaluating change requests will be approved by the Change Review Team.
- Project Scope Change Management Plan Documents:
 - Change Request Form
 - Change Request Log
 - Scope Change Management Plan

PROJECT STATUS REPORT

PJ ENTERPRISES

Project Status Report

Project Name: Catalog Product Training
Department: Training
Focus Area: Training of Catalog Customer Service Personnel
Product/Process:

Prepared By:

Document Owner(s)	Project/Organization Role
Connie Nelson	Project Manager
Jeannine Burgess	Subject Matter Expert
Robert Leahy	Technical Writer
Tracy McLaughlin	Project Coordinator

Project Status Report Version Control

Version	Date	Author	Change Description
1.0	12/15/11	Connie Nelson	Document created

Confidential
PJ Project Status Report
Last printed on 12/17/2011 9:08:00 AM

TABLE OF CONTENTS

1 PROJECT STATUS REPORT PURPOSE 3

2 PROJECT STATUS REPORT TEMPLATE 3

2.1 Project Status Report Details..... 3

2.2 Project Status Report Template..... 3

3 PROJECT STATUS REPORT APPROVALS 6

4 APPENDICES 7

4.1 Document Guidelines..... 7

4.2 Project Status Report Sections Omitted 7

Project Status Report

1 PROJECT STATUS REPORT PURPOSE

The Project Status Report is a document that Connie Nelson, Project Manager, will use as a means of formal regular reporting on the status of the Catalog Project Training project to key project stakeholders, including the Steering Committee, Project Sponsor/Paul Coverstone, and Senior Manager.

2 PROJECT STATUS REPORT TEMPLATE

2.1 Project Status Report Details

- Monthly Project Status Meeting
 - Computer Product Training
 - Successful completion of Module One
- Budget Report
 - Hardware/Server Budget: \$20,000
 - Actual costs: \$17,500
 - \$2500 under budget
- Risk Management Report
 - Discuss concerns about coverage of phone lines during training and solutions
- Issues Report
 - Revisit management's agreement to allowing customer service reps to attend training
- Project Recommendations
 - Ensure daily communication with the software development team to avoid issues that occurred in the development of Module One

2.2 Project Status Report Template

Project Name		
Prepared By: Connie Nelson	Date: 12/17/11	Reporting Period: 11/15/11 to 12/15/11

Project Status Report

Project Overall Status:

Module One of CPT has been completed

Project Summary:

Project was successful and some issues with software development will be avoided in Module 2 due to daily communication.

Milestone Deliverables performance reporting over last period

Milestone Deliverables	Due Date	% Completed	Deliverable Status
Milestone 1			
• Completion of Task Analysis & Alignment chart	11/01/2011	100%	On schedule
Milestone 2			
• Completion of Module One	12/15/2011	100%	On schedule

Milestone Deliverables scheduled for completion over next period

Milestone Deliverables	Due Date	% Completed	Deliverable Status
Milestone 1			
• Complete Module 2	02/01/2012	25%	Ahead of schedule
•			
•			
Milestone 2			
•			
•			
•			

Project impact of milestone success or failure for project remainder

Completion of Module 2—no foreseen scope changes	No changes to schedule
--	------------------------

Project Status Report

Project Budget/Financial Status

Budget Item	Planned Budget	Actual Cost	Variance/Explanation
Hardware/Server	\$20,000	\$17,500	\$2500 savings

Project Risk Management Status

Risk and Description	Risk Chance	Risk Impact	Risk Priority	Change from Last Review
<ul style="list-style-type: none"> Communication issues with software developers 	Lo	High	High	Daily communication will ensure project stays on target

Project Issue Management Status

Issue and Description	Project Impact	Target Due Date	Issue Status	Issue Resolution

Project Recommendations

Based on the successful completion of Module 1, the project is projected to be completed on time and on budget. The training is high quality and there have been minimal scope change requests. The only issue thus far has been communication with the software development team and those have been mitigated by future daily communications between that team and the ID team.

Objectives for Next Project Status Review

The next Project Status Review will outline the rollout of Module 2.

Project Status Report

Related Project Information

--

3 PROJECT STATUS REPORT APPROVALS

Prepared by _____
Project Manager/Connie Nelson

Approved by _____
Project Sponsor/Paul Coverstone

Executive Sponsor

Client Sponsor

4 APPENDICES

4.1 Document Guidelines

4.2 Project Status Report Sections Omitted

EMPLOYEE EXPENSE REPORT

[illegible]

EMPLOYEE TIME CARD

PJ ENTERPRISES

Employee Name: _____
Manager: _____
E-mail: _____
Phone: _____

Year to date totals:
Regular hrs: _____
Overtime hrs: _____
Total: _____

Employee Timecard: Daily, Weekly, Monthly, Yearly

January, February, March

	Week 1	Week 2	Week 3	Week 4	Week 5	Overtime5
January						
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						
Saturday						
Sunday						
Total	0.00	0.00	0.00	0.00	0.00	0.00
January regular hours: 0.00 January overtime: 0.00						

February

	Week 1	Week 2	Week 3	Week 4	Week 5	Overtime5
February						
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						
Saturday						
Sunday						
Total	0.00	0.00	0.00	0.00	0.00	0.00
February regular hours: 0.00 February overtime: 0.00						

March

	Week 1	Week 2	Week 3	Week 4	Week 5	Overtime5
March						
Monday						
Tuesday						
Wednesday						
Thursday						
Friday						
Saturday						
Sunday						
Total	0.00	0.00	0.00	0.00	0.00	0.00
March regular hours: 0.00 March overtime: 0.00						

PJ Enterprises

CHANGE REQUEST FORM

PJ Enterprise Group 3 Consulting Team		CHANGE REQUEST FORM (CRF)	
Project Name: PJ Enterprises Catalog Product Training		Contract Number: 6233327855	
Completed By: Connie Nelson		Date: 12/15/11	
Additional and/or Support Materials Attached: None			
Current Condition			
<p>Training is designed to assist telephone operators in providing an increased customer service satisfaction experience. Training development is on schedule to be delivered as a one day training session for initial training, ½ day training for each successive catalog, as well as an additional one day of training for new hires. Module one has been completed and project is currently on time and on budget.</p> <p>PJ Enterprises has announced a restructuring of the role and capacity of the telephone operator supervisor. This company change will affect the module two assessment activities.</p>			
Proposed Change			
<p>Module two activity (assessment) change.</p> <p>The purpose of the proposed change to the scope is to accommodate and optimize the company's upcoming supervisory role modification. Supervisors will now be able to spend more time on each call.</p>			
Justification			
<p>The change in the role of the (telephone operator) supervisors is scheduled to take place with-in the next six weeks and must be addressed in the upcoming module development. Since module two is just now being developed, there is no impact on timeline or budget due to this change.</p>			
Change Manager Information			
Change Control Number: CHG12152011		Priority: <input type="checkbox"/> Red <input checked="" type="checkbox"/> Orange <input type="checkbox"/> Yellow	
Cost Impact: No foreseen change in project cost.			
Timing Impact: No change in timing of session/activity. Minimal change in timeline of module two development.			
Quality Impact: Quality may improve. One mock call with supervisor will allow for a more detailed call and timeline will now accommodate addition of learner/supervisor coaching session.			
Scope Impact: Minimal. Change will only need addition of learner/supervisor coaching session aspect to activity.			
Other Impact: Will need to include additional meeting time with human resources to understand modified role of the supervisory position.			
Change Review Committee Information			
Disposition: <input checked="" type="checkbox"/> Approved <input type="checkbox"/> Disapproved			
Signatures			
Project Manager	Connie Nelson	12/15/11	
Project Sponsor	Paul Coverstone	12/15/11	
Follow Up			
Documentation Updated: <input type="checkbox"/> Yes <input type="checkbox"/> No		Change Implemented: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	

PROCUREMENT PLAN

PJ ENTERPRISES

Procurement Plan

December 2011

NEW CATALOG PRODUCT TRAINING

Prepared by:	Jeannine Burgess
Date:	December 16, 2011

1. Procurement Definition

Purpose: Prepare the computer lab to provide computer-based training to all new hires and existing employees on a annually on a quarterly basis. The computer lab will assist in the company's strategic plan to improvement customer service scores (survey) by 10% improvement and catalog sales by 30% over 2011 catalog sales.

- Obtain 21 computer workstations (CPU, monitors, keyboards, mouse) and all peripherals (3 printers) ;
- Obtain 20 workstations.
- Obtain 1 Instructor Multi-media workstation
- Obtain 21 computer chairs
- Obtain 3 year Maintenance Contract

2. Selection Process & Criteria

Requirements:

Hardware:

- 21 Dell workstations Intel Core 3.30 GHz
- Windows 7 Professional SP
- 1, 64 Bit Operating System
- 20 inch flat screen monitors,
- Microsoft Office Professional 2010 with Adobe Acrobat X
- 3 Year Pro Support Onsite Service Plan
- 3 GB DDR3 SDRAM at 1333MHz – s DIMMs
- Trend Micro Security Software = 36 months
- Logitech Wireless Desktop (Keyboard and mouse)

3. Project Procurement Team

Name:	Phone / email:	Procurement Role:
Connie Nelson	cnelson@pje.com	Project Manager
Tracy McLaughlin	tmclaughlin@pje.com	Project Coordinator
Jeannine Burgess	jburgess@pje.com	Subject Matter Expert
Bob Leahy	bleahy@pje.com	Technical Writer
Paul Coverstone	pcoverstone@pje.com	Training Director
Sam Stone	sstone@pje.com	Purchasing Director

File Path :

Page 1 of 6

4. Evaluation of Proposals

A prerequisite for award is that the vendor must be responsible and must submit a responsive offer. To be responsible means the vendor has the requisite business integrity, as well as financial and organizational capacities, to ensure good-faith performance. To be responsive, an offer must conform in all material respects to the RFP. Beyond these two basic criteria, the only method we have of selecting the offer most advantageous to the Company is through the proposal evaluation criteria, which is published in the RFP.

The evaluation criteria considered for inclusion in the RFP are as follows: (1) performance record of the contractor, (2) safety record, (3) relevant experience in providing comparable services on projects of similar size and scope, (4) overall quality of proposal, (5) pricing.

The RFP must contain a cost proposal format that allows the vendors to explicitly identify their charges for the deliverables identified in the project. Deliverables must be well defined so that all vendors can respond to the same deliverables thus allowing the Company to make comparative analyses of the vendor's costs.

Evaluation Criteria

The evaluation of proposal received on time will be reviewed in two phases:

Administrative Review Phase

Proposals submitted on or before the due date and time will be reviewed for:

All documents (originals and copies) requiring a signature have been signed:

Correct number of proposal copies have been submitted;

The proposals that pass the administrative review will be reviewed for completeness to ensure that all mandatory requirements are addressed satisfactorily in the project statement of work.

Proposal Quality Review

All proposals are based on a review for quality and completeness. The proposals can receive a maximum of 100 points (90% price/value relative to criteria and 10% meets or exceed criteria).

5. Purchasing Policies

Purchasing Policies for PJ Enterprises

The company maintains a high legal, ethical, managerial, and professional standard. Goods and service must be acquired in a manner that ensure the company obtains value for money by incurring the lowest cost in the fulfillment of specified needs with appropriate levels of quality and service.

Authority for Purchasing

PJ Enterprises uses the following approval path for expenditures:

Authorized Signatories	Range of Purchase
Manager (and above)	\$0 - \$2,500
Director (and above)	\$2,501 - \$10,000
Vice President (and above)	\$10,001 - \$50,000
President (and above – Board of Trustees)	Greater than \$50,000

Each project will proposal will contain a scope of services and requirements, a schedule, a contract term and a project state of work.

Each project will contain instructions and information for submitting proposals, evaluation criteria and standard terms and conditions.

Each project will contain a proposal submittal form, a form for smutting questions and a form for submitting a not bid for invited vendors.

6. Vendor Management

PJ Enterprises will perform due diligence on one or more of the prospective vendors who respond to the RFQ. The depth and formality of the due diligence performed may vary according to the risk of the outsourced relationship, the Company's past relationship with the prospective vendors and the stage of the vendor selection process. Once PJ Enterprises has issued an RFQ, received and evaluated responses, and performed due diligence, the Purchasing Department in conjunction with the requisitioning department should enter into negotiations with one or more of the vendor candidates they have determine can best meet the requirements for the engagement.

Vendor and Quality Management

Each day a short meeting with the Project Coordinator, will be setup with the selected vendors to monitor the vendor's performance, using a check list to identify what has been completed, if any obstacles have been discovered, a plan will be put into place to resolve all obstacles to the keep the tasks on the timeline. The quality of service and hardware will be evaluated during the daily meeting. Upon completion an inspection of the services and hardware will be tested using a matrix to ensure all is working properly.

Dealing with Poor Performance

The project coordinator will deal with minor issues verbally; a written record of these occasions will also be documented in the instance that the vendor is identified performing poorly. Poor performance has the potential to increase costs and result in the delay in services.

7. Project Procurement Plan / Signatures

Project Name:	New Catalog Product Training		
Project Manager:	Connie Nelson		
<i>I have reviewed the information contained in this Procurement Plan and agree:</i>			
Name	Role	Signature	Date (MM/DD/YYYY)

The signatures above indicate an understanding of the purpose and content of this document by those signing it. By signing this document, they agree to this as the formal Procurement Plan.

Glossary

RFQ: Request for Quotations – is used to invite vendors/suppliers into a bidding process to bid on specific products or services.

RFP: Request for Proposal – is a hybrid of these documents. An RFP is used when you have a general idea with some specifications and/or it's a large, complex project with potential for multiple solutions.

RQB: Request for Bid – is used when you know precisely what you need and have precise requirements and specifications.

RFI: Request for Information – is used when you don't know exactly what you want or you don't know what is available in the market place. The information received as a result of the RFI may assist in determining whether a format request for bid or proposal is necessary.

PJ ENTERPRISES

Procurement Plan

December 2011

Sources:

<http://www.unh.edu/purchasing/policy/purchasing/6-007.htm>

http://alangutterman.typepad.com/files/ecb_11.24.08_vender-selection-policies-procedures.pdf

http://en.wikipedia.org/wiki/Request_for_quotation

<http://www.palmbeachstate.edu/x4887.xml>

<http://sbinfocanada.about.com/od/management/g/procurement.htm>

INVITATION TO BID

PJ ENTERPRISES

INVITATION TO BID

ITLAB #0103-12

ITLAB TITLE: TRAINING LAB

PJ ENTERPRISES

712 SOUTH BROADWAY STREET

MENOMONIE, WI 54751

DECEMBER 11, 2011

PJ ENTERPRISES

To: All Submitters

From: Purchasing Manager

You are invited to submit sealed proposals subject to the terms, conditions, and specifications contained herein and are hereby made part of this request.

- ☐ All proposals must be executed and submitted in a sealed envelope.
- ☐ Faxed proposals will not be accepted.
- ☐ The face of the envelope shall contain the "Invitation to Bid #0103-12"
 - the proposal name "Training Lab"
 - the company name
 - delivered to:

***Purchasing
PJ Enterprises
712 South Broadway Street
Menomonie, WI 54751***

- ☐ All bids must be received at the address above no later than 3:00 PM January 3, 2012.
- ☐ Bids will be opened publicly at that time.
- ☐ Bids received after this date and time will be rejected.
- ☐ Bids will not be evaluated at this time.
- ☐ The evaluation date and time is noted in the ITLab document.

In order to insure uniformity, all bids must be submitted on the enclosed forms or exact photo copies and signed by an authorized representative of the company submitting the proposal. Proposals not submitted in accordance with the terms, conditions, specifications, and other instructions contained herein may be subject to rejection.

Direct all inquiries regarding this Invitation to Bid (ITLAB) to the Purchasing department, in writing, by e-mail: purchasing@pjenterprises.com

All inquiries, with responses, will be made available to all bidders on an equal basis without prejudice.

PJ ENTERPRISES

Table of Contents

Section A: General Conditions.....	4
Section B: Scope Of Services and Requirements	6
Project Summary	6
Schedule	6
Contract Term	6
Project Statement of Work	6
Section C: Instructions and Information	7
Process for Submitting Proposals	7
Packaging of Proposal.....	7
Number of Proposal Copies.....	7
Evaluation Criteria	7
Administrative Review Phase	7
Quality Review.....	7
Standard Terms and Conditions.....	8
Appendix A: Proposal Submittal Form.....	9
Appendix B: Form for Submitting Questions	10
Appendix C: Form for Submitting No-Bid	11

PJ ENTERPRISES

SECTION A: GENERAL CONDITIONS

To insure acceptance of the bid, follow these instructions:

SEALED PROPOSALS: All proposal sheets and forms must be executed and submitted in a sealed envelope. Do not include more than one proposal per envelope. Proposals not submitted on the attached form shall be rejected. All proposals are subject to the conditions specified herein. Those which do not comply with these conditions are subject to rejection. It is the sole responsibility of the proposer to deliver the proposal to the address contained herein on, or before, the closing hour and date indicated. The Company is not responsible for delays with postal delivery nor the normal delay in delivery for internal mail procedures. PJ Enterprises will not be responsible for the inadvertent opening of a proposal not properly sealed, addressed or identified.

EXECUTION OF PROPOSAL: Proposals must contain a manual signature of an authorized representative in the space provided on the proposal submittal form. Proposal must be typed or printed in ink. No erasures are permitted. If a correction is necessary, draw a single line through the entered figure and enter the correct figure above it. Corrections must be initialed by the person signing the proposal. Any illegible entries, pencil proposals or corrections not initialed will not be tabulated.

PRICES, TERMS and PAYMENT: Firm prices shall be quoted, typed or printed in ink, and includes all packaging, handling, shipping charges and delivery to the destination shown herein.

EVALUATION OF PROPOSALS: The evaluation committee intends to recommend to PJ Enterprises Board of Trustees to authorize the company to award a contract with the proposer, or proposers, scoring the overall highest evaluation points.

AWARDS: In the best interest of the Company, the Company reserves the right to make award(s) by individual item, group of items, all or none or a combination thereof, to reject any and all proposals or waive any minor irregularity or technicality in proposals received. The Company also reserves the right to make awards to one, or more, vendors based upon the recommendations of the evaluation committee.

DISCOUNTS: Proposers are encouraged to reflect cash discounts in unit prices quoted. Proposers may offer a cash discount for prompt payment; however, discounts for less than 30 days will not be considered in determining the lowest net cost for proposal evaluation purposes. Discount time will be computed from the date of satisfactory delivery at place of acceptance or from receipt of correct invoice at the office specified, whichever is later.

DEFINITIONS: [Company] refers to PJ Enterprises, [Proposer] refers to the dealer, manufacturer, contractor, or business organization submitting a proposal to the Company in response to this request for proposal. [Vendor] refers to the dealer, manufacturer, contractor, or business organization that will be awarded a contract pursuant to the terms, conditions and quotations of the proposal. [Proposer] and [Vendor] will be used interchangeably. [Proposer] and [Bidder] may be used interchangeably throughout this document. [Proposal] and [Bid] may be used interchangeably throughout this document.

PROPOSAL OPENING: Shall be public, at the address indicated on the ITLAB document, on the date and at the time specified on the proposal form. Proposals will not be evaluated nor will questions be fielded at the time of opening. The proposal opening is to determine the vendor pool only. It is the proposer's responsibility to assure that the proposal is delivered at the proper time and place of the opening. Proposals received after the date and time will be retained, unopened, for the record. Proposals by fax, email or telephone will not be accepted.

NO BID: If not submitting a proposal, respond by returning the proposal submission form, marking it "NO BID", and explain the reason.

CONDITION AND PACKAGING: It is understood and agreed that any item offered or shipped as a result of this proposal shall be the new, current model in production available at the time of this proposal. All containers shall be suitable for storage or shipment, and all prices shall include standard commercial packaging.

TAXES: The Company does not pay sales taxes on direct purchases of tangible personal property. Do not include these items on invoices. See exemption number on face of purchase order. Exemption does not apply to purchases of tangible personal property made by contractors who use the tangible personal property in the performance of contracts for the improvement of state owned real property as defined in Chapter 192 F.S.

MISTAKES: Proposers are expected to examine the specifications, delivery schedule, proposal prices, extensions, and all instructions pertaining to supplies and services. Failure to do so will be at the proposer's risk. In case of mistake in extension, the unit price will govern.

PJ ENTERPRISES

CLARIFICATION/CORRECTION OF BID ENTRY: The Company reserves the right to allow for the clarification of questionable entries and for the correction of obvious mistakes.

SAFETY STANDARDS: Unless otherwise stipulated in the proposal, all manufactured items and fabricated assemblies shall comply with applicable requirements of Occupational Safety and Health Act and any standards there under. Failure to comply with the condition will be considered as a breach of contract.

PAYMENT: Payment will be made by the Company after the items awarded to a vendor have been received, inspected, and found to comply with award specifications, be free of damage /defect and properly invoiced. All invoices shall bear the purchase order number. Payment for partial shipments shall not be made unless specified in the proposal. An original invoice should be submitted. Failure to follow these instructions may result in a delay in processing invoices for payment. In addition, the purchase order number should appear on bills of lading, packages, cases, delivery lists and correspondence.

COSTS: The Company is not liable for any costs incurred by a proposer in responding to this ITLAB, including those for presentations, when applicable.

UNDERWRITERS' LABORATORIES: Unless otherwise stipulated in the proposal, all manufactured items and fabricated assemblies shall carry U.L. approval and reexamination listing where such has been established.

FREIGHT TERMS: All goods will be delivered F.O.B.

PJ Enterprises
Central Receiving
712 South Broadway Street
Menomonie, WI 54751

Unless otherwise specified

PJ ENTERPRISES

SECTION B: SCOPE OF SERVICES AND REQUIREMENTS

Project Summary

PJ Enterprises is requesting proposals for a computer lab to provide computer-based training to all new hires and existing employees on a quarterly basis.

Schedule

This request for proposals will be governed by the following schedule:

Release of ITLab	October 11, 2011
Deadline to Questions	December 29, 2011
Proposals Due	January 3, 2012
Evaluation/Screening of Proposals	January 6, 2012
Purchase recommendation	January 11, 2012

Contract Term

This is a one-time purchase.

Project Statement of Work

Hardware:

21 Dell workstations Intel Core 3.30 GHz

Windows 7 Professional SP 1, 64 Bit Operating System

20 inch flat screen monitors,

Microsoft Office Professional 2010 with Adobe Acrobat X

3 Year Pro Support Onsite Service Plan

3 GB DDR3 SDRAM at 1333MHz – s DIMMs

Trend Micro Security Software = 36 months

Logitech Wireless Desktop (Keyboard and mouse)

PJ ENTERPRISES

SECTION C: INSTRUCTIONS AND INFORMATION

Process for Submitting Proposals

Packaging of Proposal

The proposal must be plainly identified as:

Name of Proposing Company

Training Lab ITLab 0103-12

Outer mailing boxes, envelopes, containers, etc., must display the ITLab number. This includes outer carrier boxes and labels. PJ Enterprises will not be held responsible for proposals that are misdirected or mishandled because of the omission of this number.

Any additional information sent separately from the proposal package must be received by the proposal due date and the ITLab number clearly identified on the outside of the package.

Number of Proposal Copies

Submit one (1) original printed copy and one (1) electronic copy of your proposal on a USB drive.

Evaluation Criteria

The evaluation of proposals received on time will be conducted in the following two phase:

Administrative Review Phase

Proposals submitted on or before the due date and time will be reviewed for:

- All documents (originals and copies) requiring a signature have been signed
- Correct number of proposal copies has been submitted

The proposals that pass the administrative review will be reviewed for completeness to ensure that all mandatory requirements are addressed satisfactorily in the project statement of work.

Quality Review

The proposals that pass the requirements review will be reviewed for quality and completeness and can receive a maximum of 100 points. The following listing provides you with the maximum points available for each factor in the evaluation:

- 90% price/value relative to criteria
- 10% meets or exceed criteria

PJ ENTERPRISES

Standard Terms and Conditions

Amendments: PJ Enterprises reserves the right to amend this ITLab prior to the proposal due date. All amendments and additional information will be posted to the company Purchasing Web site. Proposers should check this Web page daily for new information.	Contract Discussions: Prior to award, the apparent successful firm may be required to enter into discussions with the Company to negotiate the contract agreement for services. These discussions are to be finalized and all exceptions resolved within one (1) week from notification. If no resolution is reached, the proposal may be rejected and discussions initiated with the next highest scoring firm.
Confidentiality Requirements: Proposals are subject to the Wisconsin public records laws. The Company cannot protect proprietary data submitted in proposals.	Financial Information: For services and construction, the proposer will submit an audited financial statement for the most recent 12-month period. As a minimum, the audited financial statement shall consist of the firm's balance sheet and statement of operations and the firm's bonding capacity. This financial requirement may be satisfied by the firm's surety submitting a certification regarding the firm's bonding capacity, which must equal or exceed \$1 million dollars. In this regard, the firm's surety must be a licensed surety qualified to conduct business in the State of Wisconsin and rated "(A-)" or better in the most recent A.M. Best Guide and qualified to do business within the State.

PJ ENTERPRISES

APPENDIX A: PROPOSAL SUBMITTAL FORM

PJ ENTERPRISES
712 SOUTH BROADWAY STREET
MENOMONIE, WI 54751

This is to certify that I (authorized representative) have read and understood the terms, conditions, specifications and other instructions contained in this Request, and further, that the items of materials and / or services rendered do meet minimum specifications set forth in this invitation.

I further certify that this proposal is made without prior understanding, agreement, or connection with a corporation, firm, or persons submitting a proposal for the same materials, supplies, or equipment and is in all respect fair and without collusion or fraud. I agree to abide by all conditions of this request and certify that I am authorized to sign this proposal for the bidder.

ITLab		0103-12		Training Lab	
Vendor Name					
Bidding as (Check One)	Corporation		Individual		Other (Explain)
Address					
City & State					
Telephone			Fax		
E-Mail					
Representative Title					
Signature					

PJ ENTERPRISES

APPENDIX B: FORM FOR SUBMITTING QUESTIONS

Written Questions for ITLab No.	ITLab #0103-12
ITLab Title	Training Lab

Company Name	
Date	
Deadline for Questions	December 29, 2011

Type your questions in the section below. Leave the answer section blank. You are not limited to 10 questions. All questions should be sent via email to purchasing@pje.com before the deadline

	Questions	Answers [leave blank]
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

PJ ENTERPRISES

APPENDIX C: FORM FOR SUBMITTING NO-BID

ITLab No.	ITLab #0103-12
ITLab Title	Training Lab

PJ ENTERPRISES
712 SOUTH BROADWAY STREET
MENOMONIE, WI 54751

Attn: Purchasing Manager

We, the undersigned, have declined to bid on your bid number **1013-12** for a(n) **Training Lab** for the following reason(s):

_____ We do not offer this product / service.

_____ Our current workload would not afford us the time to devote to your project.

_____ Unable to meet specifications.

_____ Unable to meet insurance / bond requirements.

We understand that if the "No Bid" is not executed and returned that our name may be removed from the list of qualified bidders for PJ Enterprises.

Company Name _____

Signature _____

Company Address _____

Telephone Number _____

Source: Palm Beach State College RFP found at url: <http://www.palmbeachstate.edu>

PROJECT MANAGEMENT GLOSSARY

Term	Definition
ADBTI	Analyze, Design, Build, Test and Implement – a model used for the development of business solutions and software.
ADDIE	Analyze, Design, Develop, Implement, and Evaluate – the Instructional Systems Design (ISD) model for creating training programs.
Agency	A formally organized unit of government having administrative, programmatic, legal, fiduciary, and regulatory functions ascribed to it through Legislation, Federal mandate, or other means and for which it receives or generates revenue.
Agenda	Notice of a meeting that states meeting location, time and date of the meeting and the items to be discussed.
Analyze	The first phase in many developmental and delivery methodologies. The Analyze phase involves examination of the proposal to determine the requirements and “what” is to be addressed by the project.
Assumptions	Assumptions are factors that, for planning purposes, are considered to be true, real, or certain. Assumptions affect all aspects of project planning, as are part of the progressive elaboration of the project. Project teams frequently identify, document, and validate assumptions as part of their planning process. Assumptions generally involve a degree of risk.
Backup Package	A backup package consists of all the related supporting documentation for expenditures required to successfully pass an audit.
Baseline	The point of reference that is used as a comparison point for project performance reporting.
Benefits Realization Review	The process of reviewing the extent of realized benefits once the solution has been delivered and implemented. Measured benefits are compared with those originally proposed in the <i>Business Case</i> .
Benefits Tracking	The process of quantitatively measuring over a period of time the extent of realized benefits once the solution has been delivered and implemented.
BRS	See <i>Business Requirements Specification</i>
Budget	Planned expenditure and funds allocated for a project.
Build	A phase in systems development, but applies in almost all solution design and delivery methodologies. The Build phase involves actually creating the solution proposed by the <i>Project Definition</i> .
Business Alignment	Strategic business alignment represents an agency's capability to coordinate all the activities of its components for the purpose of achieving its objectives. A key to the success of any project is its alignment with the strategic direction of the sponsoring organization.
Business Case	The information necessary to enable approval, authorization and policy making bodies to assess a project proposal and reach a reasoned decision.
Business Owner	The person/s in the organization that will take ownership of the project's outputs and use them for the benefit of the organization.
Business Requirements Specification	A document that states specifically the business needs that the project's outputs must satisfy. It is basically the “what” aspect of the project.
CAPEX	Capital Expenditure – typically includes purchase of new equipment.
CCB	See <i>Change Control Board</i> .
Change Control	The set of practices around effectively managing changes to the project so that they are raised, assessed, prioritized and implemented efficiently and with known impact on

PJ Enterprises

	the project.
Change Control Board	A formally constituted group of stakeholders responsible for approving or rejecting changes to the project baselines.
CM	See <i>Configuration Management</i> .
Communication	The transmission and validated receipt of information so that the recipient understands what the sender intends, and the sender is assured that the intent is understood.
Communications Management Plan	A plan describing the organization and control of information transmitted by whatever means to satisfy the needs of the project. It includes the processes of transmitting, filtering, receiving and interpreting or understanding information using appropriate skills according to the application in the project environment. It is at once the master and the servant of a project in that it provides the means for interaction between the many disciplines, functions and activities, both internal and external to the project, and which together result in the successful completion of that project.
Conceptual View	A very high-level summary of what the solution will look like once it is implemented. It can be presented as a diagram.
Configuration Management	Technical and administrative activities concerned with the creation, maintenance and controlled change, throughout the life of the product, of an item's descriptive and governing characteristics, which can be expressed: In functional terms, i.e. what performance the item is expected to achieve In physical terms, i.e. what the item should look like and consist of when it is completed
Consequences	The results following some activity or activities.
Constraints	Applicable restrictions that will affect the performance of the project. Any factor that affects when an activity can be scheduled.
Continuous Quality Improvement	Constantly striving to make things better, which is a particular aim of a Quality Assurance Program
Contract Administration	Managing the relationship with the seller.
Contract Closeout	Completion and settlement of the contract, including resolution of any open items.
Contract Review	Monitoring and control of performance and progress, making payments, recommending modifications and approving contractor's actions to ensure compliance with contractual terms during contract execution.
Cost Analysis	The analysis of the cost elements of a proposal or on-going work. It includes verification of cost data, evaluation of all elements of costs, and projection of these data to determine the effect on price.
Cost Control System	Any system of keeping costs within the bounds of budgets or standards based upon work actually performed.
Cost Variance	Any difference between the budgeted cost of an activity and the actual cost of that activity. In earned value, EV (Earned Value) less ACWP (Actual Cost of Work Performed).
CPM	See <i>Critical Path Method</i> .
CQI	See <i>Continuous Quality Improvement</i> .
Crashing	Taking action to decrease the total project duration after analyzing a number of alternatives to determine how to get the maximum duration compression for the least cost.
Critical Path Analysis	Procedure for calculating the critical path and floats in a network.
Critical Path Method	A network analysis technique used to predict project duration by analyzing which sequence of activities (which path) has the least amount of schedule flexibility (the least

PJ Enterprises

	amount of float). Early dates are calculated by means of a forward pass, using a specified start date. Late dates are calculated by means of a backward pass, starting from a specified completion date (usually the forward pass' calculated early finish date.
CV	See <i>Cost Variance</i> .
Deliverable	Any measurable, tangible, verifiable outcome, result, or item that must be produced to complete a project or part of a project. Often used more narrowly in reference to an external deliverable, which is a deliverable that is subject to approval by the project sponsor or customer
Deliverable/Product Verification	The measurement of physical properties stated in the specifications for a product/deliverable and compares them with the values for each requirement documented in the product specifications.
Delphi Technique	A process where a consensus view is reached by consultation with experts. Often used as an estimating technique.
Design	The project phase involving the process of determining what the solution will look like, how it should be created and how it should be implemented.
Design Reviews	A formal, documented, comprehensive and systematic examination of a design to evaluate the design requirements and the capability of the design to meet these requirements and to identify problems and propose solutions.
Documentation	The collection of reports, user information and references for distribution and retrieval, displays, back-up information and records pertaining to the project.
Duration	The length of calendar time required to complete a project or part of a project. Do not confuse this with <i>Effort</i> .
Earned Value	The physical work accomplished plus the authorized budget for this work. The sum of the approved cost estimates (may include overhead allocation) for activities (or portions of activities) completed during a given period (usually project-to-date). Previously called budgeted cost of work performed (BCWP) for an activity or a group of activities.
Earned Value Analysis	A technique for determining the value delivered by a project to date compared with what it was planned to deliver.
ECN	See <i>Engineering or Design Change Notice</i> .
ECP	See <i>Engineering or Design Change Proposal</i> .
Effort	The measure of the amount of work required to complete a project or part of a project. Do not confuse this with <i>Duration</i> .
Engineering or Design Change Notice	The formal release of an engineering or design change.
Engineering or Design Change Proposal	A proposal submitted by the seller in response to a buyer's request for an ECP to change the existing contract effort. Only the buyer can initiate the request for an Engineering Change Proposal. This activity is usually preceded by a Request For Change. The user, buyer, or the seller can initiate a Request For Change to the contract. It is an exploratory activity.
Estimate	A calculated guess of the size, cost and duration of a future project.
EVA	See <i>Earned Value Analysis</i>
Evaluate	A phase in some project methodologies in which the success of the project in meeting its objectives is measured and reported.
Executive Sponsor	The sponsor is an executive responsible for the strategic direction of a project. An Executive Sponsor should have the authority to define project goals, secure resources, and resolve organizational and priority conflicts. Multiple studies indicate a direct correlation between the lack of project sponsorship and project failure. Well-meaning but costly mistakes include substituting a steering committee for a sponsor, and assuming that a big-budget and highly visible project does not need a formal sponsor. The Executive Sponsor's primary role is to:

PJ Enterprises

	<p>Champion IT projects from initiation to completion</p> <p>Participate in the development and selling of the project business case</p> <p>Present overall vision and priorities for the project</p> <p>Assist in determining final funding and project direction</p> <p>Serve as executive liaison to key State stakeholders, e.g., legislators, Agency directors and managers</p> <p>Chair the project steering committee</p>
External Project Management Roles	Roles assigned to the project manager that are not directly associated with the work of the project.
Formal Acceptance	Accepting the delivery of a deliverable or product according to established processes normally based on verifying that it is in accordance with the Product Description or specifications of the Project Deliverable.
Gantt Chart or Schedule	A graphic display of schedule-related information. In the typical Gantt or bar chart, activities or other project elements are listed down the left side of the chart, dates are shown across the top, and activity durations are shown as date-placed horizontal bars.
Implement	The phase of a project involved with delivering the solution to the <i>Business Owner</i> .
Information Distribution	Making needed information available to project stakeholders in a timely manner.
Instructional Systems Design	A systematic approach to designing and delivering training.
Internal Project Management Roles	Roles assigned to the Project Manager or Project Management team directly related to the work of the project.
ISD	See <i>Instructional Systems Design</i>
Issue	An event that is currently threatening the project and requiring attention.
Issues Management	A set of practices designed to effectively identify, prioritize and monitor issues and manage them through to resolution.
Knowledge Management	The acquisition, management and distribution of relevant information to the parties who need to know.
Lessons Learned	The learning gained from the process of performing the project. Lessons learned may be identified at any point. Also considered a project record.
Life-Cycle	A collection of generally sequential project phases whose name and number are determined by the control needs of the organization or organizations involved in the project.
Memorandum of Understanding	Any written agreement-in-principle describing how a commitment will be administered.
Milestone	A significant event that acts as a progress marker during the life of a project and is reported on. Usually includes the completion of a major deliverable.
Minutes	Notes taken during a meeting that summarize discussions and agreed actions.
Modeling	The creation of a physical representation or mathematical description of an object, system or problem that reflect the functions or characteristics of the item involved. Model building may be viewed as both a science and an art.
MOU	See <i>Memorandum of Understanding</i> .
Multi-Attribute Utility	Mathematical tools for defining and comparing alternatives to assist in decision-making about complex alternatives, especially when groups are involved. They are designed to answer the question, "What is the best choice?" The models are based on the assumption that the apparent desirability of a particular alternative depends on how its attributes are viewed.

PJ Enterprises

Network Diagram	A schematic display of the sequential and logical relationship of the activities which comprise the project. Two popular drawing conventions or notations for scheduling are arrow and precedence diagramming.
OBE	See <i>Organizational Breakdown Structure</i> .
Organizational Breakdown Structure	A depiction of the project organization arranged so as to relate work packages to organizational units.
Organizational Change Management	The task of organizational change management is to bring order to an organization that is responding to a change event. It is not pretending that change is or can always be well organized and disciplined.
PDLC	See <i>Product Development Life Cycle</i>
Performance Indexes	Project planning and status indicators that periodically measure variances (usually cost and schedule) and require documented corrective actions to eliminate the variances that exceed predetermined thresholds.
PERT	See <i>Program Evaluation and Review Techniques</i> .
PIR	See <i>Post-Implementation Review</i>
PM	See <i>Project Manager</i> .
PMBOK®	See <i>Project Management Body of Knowledge®</i> .
Post-Implementation Review	A review conducted sometime after the completion of a project in order to determine whether the project met its objectives – usually abbreviated to PIR.
Probability	The likelihood of occurrence. The ratio of the number of chances by which an event may happen (or not happen) to the sum of the chances of both happening and not happening.
Procurement Liaison	In some governmental entities, this person is designated to be responsible for the procurement functions for the agency and acts a liaison with the Materials Management Office and/or the Information Technology Management Office.
Procurement Planning	Determining what to procure and when.
Product Development Life-Cycle	A methodical approach to designing and delivering new products – usually abbreviated to PDLC.
Product-oriented WBS	A project's product components or elements that make up the overall deliverable assembled into some hierarchical arrangement that facilitates project management tracking and control.
Program	A group of interrelated projects satisfying a common objective and managed as a set by a Program Manager.
Program Evaluation and Review Techniques	An event-oriented network analysis technique used to estimate program duration when there is uncertainty in the individual activity duration estimates. Program Evaluation and Review Techniques (PERT) applies the critical path method, using durations that are computed by a weighted average of optimistic, pessimistic, and most likely duration estimates. PERT computes the standard deviation of the completion date from those of the path's activity durations. Also known as the Method of Moments Analysis.
Project	A set of interrelated activities managed in a coordinated way and designed to deliver a unique product or service within a given time frame and resources.
Project Baseline Control	Established baselines for scope, cost and schedule under some form of version control. Once the project has been contained in these three dimensions, it can be measured, monitored and controlled. If a project does not have such baseline management, it cannot be managed and measured as a closed system, and must be therefore considered to be out of control.
Project Board	A group of people ultimately responsible for a project's success through monitoring its progress, reviewing its continued relevance to the organization's objectives and overcoming institutional barriers. In some organizations, may be referred to as a

PJ Enterprises

	<i>Steering Committee.</i>
Project Brief	See <i>Project Definition</i>
Project Budget	The amount and distribution of money allocated to a project.
Project Champion/Leader	The person who espouses the project and secures for it necessary support and resources. See also <i>Project Sponsor</i> .
Project Change Management	Management of approved changes to project work content caused by a scope of work change or a special circumstance on the project (weather, strikes, etc.).
Project Charter	A document issued by senior management that formally authorizes the existence of a project. It provides the project manager with the authority to apply organizational resources to project activities.
Project Control Plan	A plan describing a sequence of activities which are used to steer the project towards conformance with project requirements
Project Definition	A document describing succinctly the project objectives, scope, summarized costs and resource requirements. In some organizations, may be referred to as the <i>Project Brief</i> or <i>Terms of Reference</i> .
Project Deliverable(s)	Any measurable, tangible, verifiable outcome, result, or item that must be produced to complete a project or part of a project. Often used more narrowly in reference to an external deliverable, that is a deliverable that is subject to approval by the project sponsor or customer.
Project Leadership	Leadership in the context of a project, e.g. leading with a focus on the project's goals and objectives and the effectiveness and efficiency of the process.
Project Management Body of Knowledge®	An inclusive term that describes the sum of knowledge within the profession of project management. As with other professions—such as law, medicine, and accounting—the body of knowledge rests with the practitioners and academics that apply and advance it. The PMBOK® includes proven, traditional practices that are widely applied, as well as innovative and advanced ones that have seen more limited use.
Project Management Principles	Tools, processes, skills and behaviors that are used to guide project performance.
Project Manager	The person selected by the organization to manage the project resources and activities in order to deliver the agreed project outputs. The individual responsible for managing a project.
Project Objectives	Project scope expressed in terms of outputs, required resources and timing.
Project Organization	The orderly structuring of project participants.
Project Organizational Chart	A graphical display of the project's organization structure.
Project Plan	A formal, approved document used to guide both project execution and project control. The primary uses of the project plan are to document planning assumptions and decisions, facilitate communication among stakeholders, and document approved scope, cost, and schedule baselines. A project plan may be summary or detailed.
Project Procurement	The processes required to acquire goods and services to attain project scope from outside the performing organization. It consists of procurement planning, solicitation planning, solicitation, source selection, contract administration, and contract closeout.
Project Repository	A place (either physical or virtual) established for the consistent and effective storage and retrieval of all project information for the efficient use by the project manager and his/her project Team.
Project Reviews	An evaluation of current project results or procedures.
Project Schedule	The planned dates for performing activities and the planned dates for meeting milestones.

PJ Enterprises

Project Scope	The work that must be done to deliver a product with the specified features and functions.
Project Sponsor	A senior person within an organization that has ultimate responsibility for the success of a project through overcoming organizational barriers and advocating for the project. They may devote resources to the project and in some cases is the <i>Business Owner</i> .
Project Team Building	The forming of a group of people into a team that is to work together for the benefit of the project. It can be achieved in a formal manner by use of startup meetings, seminars, workshops, etc. and in an informal manner by getting the team to work well together. Motivating and resolving conflicts between individual members of the team are important elements of teamwork. Cultural characteristics of the team members should be given full consideration. Different cultures create different working needs.
Project Team Designation	<p>The full-time and part-time resources assigned to work on the deliverables of the project, and achieve the project objectives. They are responsible for:</p> <p>Understanding the work to be completed</p> <p>Planning out the assigned activities in more detail if needed.</p> <p>Completing assigned work within the budget, timeline and quality expectations</p> <p>Informing the Project Manager of issues, scope changes, risk and quality concerns</p> <p>Proactively communicating status and managing expectations</p> <p>The project team can be made up from within one functional department or organization, or from many. A cross-functional team has members from multiple departments or organizations, and typically involves matrix management.</p>
Project/Executive Sponsor	<p>The person who has ultimate authority over the project. The executive sponsor provides project funding, resolves issues and scope changes, approves major deliverables and provides high-level direction. They also champion the project within their organization.</p> <p>Depending on the project, and the organizational level of the executive sponsor, they may delegate day-to-day tactical management to a project sponsor. If assigned, the project sponsor represents the executive sponsor on a day-to-day basis, and makes most of the decisions requiring sponsor approval. If the decision is large enough, the project sponsor will take it to the executive sponsor.</p>
Projectized Organization	Any organizational structure in which the project manager has full authority to assign priorities and to direct the work of individuals assigned to the project.
QA	See <i>Quality Assurance</i> .
QC	See <i>Quality Control</i> .
Quality Assurance	<p>The process of evaluating overall project performance on a regular basis to provide confidence that the project will satisfy the relevant quality standards.</p> <p>The organizational unit that is assigned responsibility for quality control.</p>
Quality Control	<p>The process of monitoring specific project results to determine if they comply with relevant quality standards and identifying ways to eliminate causes of unsatisfactory performance.</p> <p>The organizational unit that is assigned responsibility for quality control.</p>
Quality Management	That aspect of the overall management function that determines and implements the quality policy.
Quality Management Plan	A document setting out the specific quality practices, resources and sequence of activities relevant to a particular product, service, contract or project.
Quality Measurement	See <i>Quality Metrics</i> .
Quality Metrics	The tools and techniques of quality measurement that include: benefit/cost analysis, benchmarking, flowcharting, both cause and effect diagrams and system or process

PJ Enterprises

	charts, design of experiments, and cost of quality.
Quality Plan	A plan identifying which quality standards are relevant to the project, and determining how to satisfy them.
RAM	See <i>Responsibility Assignment Matrix</i> .
Requirements Specifications	An information vehicle that provides a precise description of a specific physical item, procedure, or result for the purpose of purchase and/or implementation of the item or service.
Resource	People, materials, tools and systems needed during a project.
Responsibility Assignment Matrix	A structure that relates the project organization structure to the work breakdown structure to help ensure that each element of the project's scope is assigned to a responsible individual.
Return on Investment	The financial benefit resulting from a project once the cost of the project is deducted from the financial gain.
Risk	An event that could possibly occur and which would have an impact on the project if it happens.
Risk Assessment	The process of identifying potential risks, quantifying their likelihood of occurrence and assessing their likely impact on the project.
Risk Avoidance	Risk avoidance is changing the project plan to eliminate the risk or to protect the project objectives from its impact. It is a tool of the risk response planning process.
Risk Evaluation Checklist	A template designed to assist the project manager in an assessment of the risks associated with the project.
Risk Identification	Determining which risks might affect the project and documenting their characteristics. Tools used include brainstorming and checklists.
Risk Management	A set of practices designed to effectively identify, prioritize and monitor risks and plan for their mitigation. An organized assessment and control of project risks.
Risk Management Plan	Documents how the risk processes will be carried out during the project. This is the output of risk management planning.
Risk Metrics	The tools and techniques for risk monitoring and control. They include: project risk response audits, periodic project risk reviews, earned value analysis, technical performance measurement, and additional risk response planning.
Risk Mitigation	Risk mitigation seeks to reduce the probability and/or impact of a risk to below an acceptable threshold.
ROI	See <i>Return on Investment</i>
Schedule Control System	A system for controlling changes to the project schedule.
Schedule Estimating/Development	Determining the start and finish dates for project activities, using tools and techniques that include mathematical analysis (CPM, GERT, and PERT), duration compression, simulation, resource leveling, project management software and coding structure.
Schedule Management System	A system for the management or rearrangement of the activities in a project schedule to improve the outcome based on the latest available information.
Schedule Tracking	A process of periodically documenting the factors affecting time constraint status during the course of a project.
Schedule Variance	Any difference between the scheduled completion of an activity and the actual completion of that activity. In earned value, $EV \text{ less } BCWS = SV$.
Scope	A clear description of the breadth of a project – what is in and what is out.

PJ Enterprises

Scope Definition	Subdividing the major deliverables into smaller, more manageable components to provide better control.
Scope Management Plan	A plan describing the management of the project's scope, from given goals and objectives, through explicit definition, to production, to satisfactory delivery of the required product.
Scope Statement	The scope statement provides a documented basis for making future project decisions and for confirming or developing common understanding of project scope among the stakeholders. As the project progresses, the scope statement may need to be revised or refined to reflect approved changes to the scope of the project.
SDLC	See <i>Software Development Life Cycle</i>
Sensitivity Analysis	A method of testing the degree of sensitivity of a system, whether physical or notional, to incremental changes to its variables. This analysis enables the determination of those variables that are the most significant, and possibly the selection of the best or optimal settings or solution to a problem.
Simulations	A simulation uses a project model that translates the uncertainties specified at a detailed level into their potential impact on objectives that are expressed at the level of the total project. Project simulations use computer models and estimates of risk at a detailed level, and are typically performed using the Monte Carlo technique.
Sizing	A preliminary guess with a wider degree of tolerance than an <i>Estimate</i> . The tolerance could be as wide as ± 50 percent.
Socialization	The technique for obtaining from stakeholders commentary and critique about a document, an idea or a proposed solution.
Software Development Life Cycle	A methodical approach to designing and delivering software – usually abbreviated to SDLC.
SOW	See <i>Statement of Work</i> .
Staffing Plan	A plan that identifies competent people suited to the various types of work involved in the project that becomes the basis for determining the project team.
Stakeholder	Individuals and organizations that are actively involved in the project, or whose interests may be positively or negatively affected as a result of project execution or project completion. They may also exert influence over the project and its results.
Stakeholder Group	Stakeholders that have similar interests in a project.
Stakeholder Management Plan	A plan for the management of expectations of the people who have a vested interest in the outcome of the project.
Statement of Work	A description of all the work required to complete a project, which is provided by the customer
Status Report	A written report given to both the project team and to a responsible person on a regular basis stating the position of an activity, work package, or whole project. Status Reports should be used to control the project and to keep management informed of project status.
Steering Committee	A group of people ultimately responsible for a project's success through monitoring its progress, reviewing its continued relevance to the organization's objectives and overcoming institutional barriers. In some organizations, may be referred to as a <i>Project Board</i> .
Strong Matrix Organization	Any organization having more characteristics of a projectized organization than a functional organization. That is, more full-time project managers with considerable authority and full-time project administration staff.
Team Leader	A person assigned to manage a team in order to produce a discrete set of deliverables within a project.
Terms of Reference	See <i>Project Definition</i>

PJ Enterprises

Test	The process of checking the outputs of a project against a predetermined set of agreed criteria.
TOR	Terms of Reference – see <i>Project Definition</i>
Total Quality Management	A common approach to implementing a quality improvement program within an organization.
TQM	See <i>Total Quality Management</i> .
Variance	Any actual or potential deviation from an intended or budgeted figure or plan. A variance can be a difference between intended and actual time. Any difference between the projected duration for an activity and the actual duration of the activity. Also, the difference between projected start and finish dates and actual or revised start and finish dates.
Walk-Throughs	<p>The examination of the quality of an operational procedure or test by simulating the actual execution but bypassing high risk or expensive operations. It ensures that personnel and equipment are ready to carry out the real thing,</p> <p>A peer group mentally stepping through software design and logic flow with test cases to identify errors</p>
WBS	See <i>Work Breakdown Structure</i> .
Work Breakdown Structure	<p>A deliverable -oriented grouping of project elements that organizes and defines the total work scope of the project. Each descending level represents an increasingly detailed definition of the project work.</p> <p>A tabular or graphical hierarchical break down of the project work into related tasks.</p>
Work Package	A deliverable at the lowest level of the work breakdown structure, when that deliverable may be assigned to another project manager to plan and execute. This may be accomplished through the use of a subproject where the work package may be further decomposed into activities.