*The **scope statement** is an agreement among the project team, the project sponsor and key stakeholder (customer/user). It represents a common understanding of the project for the purpose of facilitating communication among the stakeholders and for setting authorities and limits for the project manager and team. The scope statement includes relating the project to business objectives (need), and defining the boundaries of the project in multiple dimensions including deliverables, milestones, and budget.*

Example: Healthcare Information Technology Scope Statement

Project Objective

Successfully implementing Superstar Discharge Planning and Utilization Review/Management System to ensure maximum return on investment, not to exceed fees of $45,000.

Deliverables

- Benchmarking current process
- Product tailoring to track metrics, discharge reports, referrals at a glance, discharge stats
- Assessment and documentation of improvements maximizing use of software
- Eliminate or improve manual documentation and analysis functions
- Comparative analysis to streamline staff productivity and cross function utilization review (UR) communication
- Review and reduce delays in discharge and improve throughput, reducing excess days: PAS process assessment
- Implementation of Superstar System
- Document and develop improved denial management process and revenue opportunities

Milestones

1. Phase I: Complete pre-implementation, 2 mos. process and data analysis, interviews assessments, validation and implementation
2. Phase II: Development of education and change management processes

Technical Objectives/Observations

1. Definition and source of current metrics provided for UR and discharge planning process at each facility to be evaluated
2. Comparative analysis of pre and post install data metrics for process
3. Practice recommendations for additional process improvements and findings

Limits and Exclusions (beyond considered out of scope)

1. Hospital site will provide access to data required.
2. Hospital is responsible for Order Entry, Home Health Orders and Transfer forms.
4. Length of stay will not be evaluated on an ongoing basis.
5. Reserve the right to sub-contract consultation roles.
6. Training for consultants on Superstar System must be provided during the hours of 8:00A.M. to 6:00 P.M. Monday through Friday.

Customer Review/Approver

Benny Maxwell - CIO

*The **statement of work (SOW)** is generally between a purchaser of goods and a seller of a good, contains more legal language and generally a service agreement or contractual agreement. It is a document that accurately describes service requirements in terms of output requirements and the required quality level or standard of acceptable performance of outputs. Basically, the SOW tells "what" needs to be accomplished. It serves as a guideline of the agreements on performance between a purchasing organization and a seller of goods and/or services. It is usually an attachment to a contract or a memorandum of understanding between two organizations. As a component of the contract, it is often used to settle disputes over what work should or should not be included in a project. It establishes expectations for a variety of issues in the contract relationship.*

Elements of a SOW:

Although there is no hard and fast rule about what a SOW should look like, the following elements should be considered when writing a SOW. The SOW can be tailored to the specific requirement.

1. Scope of Work: Describe the work being provided, including required deliverables, milestones, performance standards and due dates
2. Period of Performance: List the start and end date for the entire project. Discuss anything else relating to scheduling.
3. Physical Location: Describe where the work will be performed. For example: The place of performance for this contract will be Building 2, XYZ Hospital.
4. Supplies and Equipment: List the supplies and equipment that will be used. If you will be providing any equipment to the contractor, list it.
5. Payment Rate: State the dollar amount computed by job, month, day or hour.
6. Acceptance Criteria: Describe how the buyer or receiver of goods will determine if the product or service is acceptable, i.e., what criteria will be used to state the work is acceptable.
7. Total not to Exceed: State the total dollar amount that the award cannot exceed.
8. Special Requirements: This specifies any special hardware or software, specialized workforce requirements, such as degrees or certifications for personnel, travel requirements and anything else not covered in the contract.

Tips for Preparing an Effective SOW:

1. Use plain and simple language in writing your SOW. Avoid jargon, vague terms and rambling sentences. While there is a natural tendency to want to cover all possible contingencies in a SOW and to establish the basis for an ironclad, no-risk, enforceable contract, this often leads to excessive "legalese". This creates confusion, misunderstandings and contradictions. Ask yourself: "What would a reasonable person looking at this conclude?"
2. There is huge potential within a SOW for overlap, duplication, and/or contradiction with the Terms and Conditions of the resulting contract.
3. Use generic (non-proprietary) terminology and references in describing your requirements. This allows for greater competition and it also minimizes the risk of a bid challenge or allegation that the requirements were slanted to a particular vendor.
4. Remember to spell out acronyms and provide definitions for any technical or unique terms used within your SOW.

In summary, do your best in conveying to the vendors what the requirement is and what it will take on their part to complete the work. If you are ever in doubt about whether to include something or not, check with your legal department for advice.

Project Management Tools and Software: *Do your due diligence to review the products thoroughly and make the selection based on the needs of your organization.*

Below are products I have reviewed in the past. I do not want to recommend any specific product because time and need changes everything.

- AtTask
- eProject
- Vertabase Pro

- Niku / Clarity
- MS Project Server
- Project Insight

*A **Project Charter** typically serves as an internal document that captures high level planning information (scope, deliverables, assumptions, etc.) about the project and specifies the project sponsor. The Project Manager creates the Project Charter in the Initiation Phase of the Project, typically in consultation with the Business Owner/Manager. Its purpose is to recognize the existence of the project and to begin the planning process required to accomplish the project goals. It is not intended to be shared with the customer as a formal contract or legal document.*

Project Charter Sample/Template*:*

PROJECT CHARTER	
Project Name:	Project Sponsor:
Project Manager:	Business Manager/Business Owner:

Date:

1. PROJECT GOALS
Describe the business need, opportunity/issue that the project was undertaken to address, i.e., the project justification.
2. DELIVERABLES
Provide a high level list of what needs to be done in order to reach the goals of the project. Each deliverable should be detailed so that the Project Team will understand what needs to be accomplished. Describe the deliverable using action words (verbs) such as "deliver, provide, create, research, etc. Deliverables should be measurable, so the Project Sponsor and Team can determine whether the deliverable has been successfully completed at the project's conclusion.
3. SCOPE DEFINITION
Document the scope definition be delivered. To assist you in defining scope, use documentation such as RFP', sales proposals, business requirements, functional specifications, etc. to set and limit the scope. In Scope is what the project will include to meet the requirements of the Project goals. Out of Scope excludes responsibilities, activities, deliverables or other areas that are not part of the Project. List what the project will and will not include.
4. PROJECT MILESTONES
Identify the significant project milestones, including invoicing dates to the client.
5. ASSUMPTIONS, CONSTRAINTS & DEPENDENCIES
Identify the assumptions that were made to form the basis of defining scope. Also identify any assumptions that will be made for the purposes of planning the project. The objective here is to set the boundaries and address how the triple project management constraint (scope, time, resources and cost) are potentially impacted/managed. List any constraints (potential factors that will impact the delivery or make it difficult to manage the project) on the project or dependencies on resources or funding to the project. Consider time, cost, dates and regulatory issues as constraints or other dependencies to the project.
6. Attach RELATED DOCUMENTS here:
Reference any related documents that were used to define scope and assumptions – e.g., RFQ, RFP, Sales Proposal, etc.
7. PROJECT STAKEHOLDERS / ORGANIZATIONAL STRUCTURE
Identify key stakeholders and team members by function, name and role.

Function	Name	Role

PROJECT AUTHORIZATION		
Approved by:	Business Owner	Date
Approved by:	Project Manager	Date

Project Management Institute Information:

All of the information is included in the Project Management Handbook. The below is taken directly from the handbook. http://www.pmi.org/PDF/pdc_pmphandbook.pdf

Contact Hours of Project Management Education
Verify at least 35 contact hours of specific instruction that addressed learning objectives in project management. Document all of the education hours regardless of when they were accrued. **The course work must be completed at the time you submit the application.**
NOTE: One contact hour is equivalent to one actual hour (60 minutes) of training or instruction received.

The course hours may include content on project quality, project scope, project schedule, project budget, project communications, project risk, project procurement, and project integration management.
You can satisfy the educational requirements by demonstrating the successful completion of courses, workshops and training sessions offered by one or more of the following types of education providers:
A. PMI Registered Education Providers (R.E.P.s)*
B. PMI Component organizations*
C. Employer/company-sponsored programs
D. Training companies or consultants
E. Distance-learning companies, including an end-of-course assessment
F. University/college academic and continuing education programs
**Courses offered by PMI R.E.P.s, PMI Components (chapters, specific interest groups, colleges) or PMI are preapproved for contact hours in fulfillment of the educational eligibility requirement.*
NOTE: One hour of classroom instruction equals one contact hour. If you have completed a university or college course on project management that met for three hours per week for 15 weeks, you would document 45 contact hours. If only a portion of a course dealt with project management, only the hours spent on project management can be applied toward the total.
The following education does not satisfy the education requirements:
• PMI chapter meetings*
• Self-directed learning (e.g., reading books, watching instructional videos or sessions with coaches or mentors)
**If at least one hour of a chapter meeting is spent conducting a learning activity, the hour(s) spent in that activity can be counted towards the educational eligibility requirement.*
NOTE: While you may be able to document applicable classes that counted toward a bachelor's degree or MBA, you cannot document the degree program in its entirety because some classes within the program will not apply.
Refer to the PMI Credential Examination Policies & Procedures section in the PMP handbook for details on next steps after you submit your application.

Reference Material for Servant Leadership:

Books:
Servant Leadership by Robert K. Greenleaf

The Power of Servant Leadership by Robert K. Greenleaf
The Servant Leader: How to Build a Creative Team, Develop Great Morale and Improve the Bottom Line of Performance by James A. Autry
Seven Pillars of Servant Leadership: Practicing the Wisdom of Leading by Serving by James W. Sipe

Article:
Becoming a Servant Leader: Do you Have What it Takes by John E. Barbuto, Jr. and Daniel W. Wheeler (available for download at: http://www.ianrpubs.unl.edu/epublic/live/g1481/build/g1481.pdf)

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