# PMPP 201 Unit 3: Scope Knowledge Area

## Overview

Welcome to Unit 2 of PMPP 201. In this Unit, we begin our weekly dive into the second of the 10 “Project Management Knowledge Areas,” as listed in the Project Management Institutes Body of Knowledge (PMBOK). As noted in PMPP 201 Unit 1, the PMBOK is at the core of our curriculum and Learning Outcomes.

This unit will consider the Knowledge Area of **Scope**.

Every organization that wants to accomplish ‘more’ will do so through project management (they may or may not have a formal project management system). There may be several needed or possible initiatives. There are typically too many needs, so much that the project can get cluttered with add-ons or changes. Project scope management is designed to keep the project focused on the original (or agreed upon changes) deliverables.

We target our assignments to prepare you for use in real-world project management. You will commonly perform work based on a given scenario or use samples/templates from the web. Plus, each week, you’ll be submitting a Weekly Recap Status Report that discusses lessons learned.

## Topics

This unit is divided into the following topics:

1. The Scope Management Plan
   1. Learning that projects fail at the beginning and not at the end, you will begin to analyze the components of the Scope Management Plan.
2. Collect Project Requirements
   1. In developing the best scope for your project, you need to collect the project requirements from the stakeholders. You will discover the channels that provide these requirements. These requirements help determine the deliverables of the project.
3. Formulating the Work Breakdown Structure (WBS)
   1. The WBS is NOT a list of activities but a list of phases (or rather, categories of phases[[1]](#footnote-1)) that lead can be ‘drilled-down’ to the deliverables. The WBS is typically visually displayed (there are several ways to do this).
4. Validate and Control Project Scope
   1. The customer must be in alignment with the determined deliverables. In other words, they approve it. The approval system is very closely related to the processes of a *change control system* (remember the Form created in Unit 1?). Using the change control system is a great method to document customer approval. Plus, if there are needed changes to the project scope, this system is used, too.

## Learning Outcomes

When you have completed this unit, you should be able to:

* Draft a Scope Management Plan beyond (just) drafting a Preliminary Scope Statement.
* Determine the sources to collect project requirements and then consolidate and compose a list of deliverables.
* Create a WBS using a preferred visual display template.
* Establish a detailed flow chart for an Approval/Change Control System.

## Activity Checklist

Below is a checklist of learning activities you will benefit from in completing this unit. You may find it useful for planning your work.

It is important to complete ALL Personal Activity PRIOR to FAR Centre sessions.

|  |  |  |
| --- | --- | --- |
| 🗹 | **Activities** | **Expected Time Commitment** |
|  | **Personal Activity 3.0.1:** Watch Instructor Video (PowerPoint file included for later reference) | 30 minutes |
|  | **Personal Activity 3.0.2:** Read Fundamentals of PM (FPM), Chapter 4 | 50 minutes |
|  | **Personal Activity 3.0.3:** Read All In One (AIO), Chapter 5 | 60 minutes |
|  | **Personal Activity 3.0.4:** Watch AIO Video “Change Control” by Phillips | 18 minutes |
|  | **FAR Centre Activity 3.1.1:** Form teams of 3 to 5. Each team is to select a Scope Statement from the file, “Sample Scope Statement” and then draft a Scope Management Plan using the ‘bullet points’ found in AIO, pages 175 and 176. The resulting plan should have at least 10 bullets/statements. | 20 minutes |
|  | **FAR Centre Activity 3.1.2:** Share your results with the class. Your team presentation should take 2 to 3 minutes. | 10 minutes |
|  | **FAR Centre Activity 3.2.1:** Return to your teams denote the sources to collect the project requirements (list the channels). You may add some ‘story’ (fiction) to your P\project scope to better describe the channels used. It is OK to be creative, so have fun with this. | 20 minutes |
|  | **FAR Centre Activity 3.2.2:** Share your team’s ‘story’ with the class. Your team presentation should take 2 to 3 minutes. | 20 minutes |
|  | **FAR Centre Activity 3.3.1:** Returning to your same teams, create a WBS for your project. You will likely have to fabricate the WBS’ details (try to make them ‘believable’). Consider the sample in AIO Figure 5-1, or use a template from a web search. | 30 minutes |
|  | **FAR Centre Activity 3.3.2:** You will present your WBS’s to the class and discuss the details. Your team presentation should take 3 to 5 minutes. | 20 minutes |
|  | **FAR Centre Activity 3.4.1:** In your groups, create a flow chart (in Excel or yEd) to document the steps for *scope approval* through your stakeholder network (This is also your change control system.) Be sure to include ‘paths’ for recording change requests and processing them for approval/denial. | 30 minutes |
|  | **FAR Centre Activity 3.4.2:** Share your form with the group and explain your flowchart. Your team presentation should take 2 to 3 minutes. | 20 minutes |
|  | **Assessment 3.1: Written Assignment:** Similar to FAR Centre Activity 3.4.1, using the (new) scenario provided, build a new scope management flow chart for the given scenario, but this time, include (at the beginning) the process flow chart steps for the Charter Statement approval, too. | **Tbd** |
|  | **Assessment 3.2: FAR Centre Participation:** Yourdiscussion and presentation participation will be considered by Facilitator and an evaluation will be submitted weekly to the Instructor. Plus, you will submit your Weekly Recap Status Report (using the template provided). | **Tbd** |

## Resources

Purchased Resources (textbooks, DVD):

* Fundamentals of PM (FPM), (Heagney), Chapter 4
* All In One (AIO), (Phillips), Chapter 5
  + AIO Video, “Change Control” (from CD that comes with the textbook)

Provided Resources (files/weblink):

* File: Weekly Instructor Video Recording [Link]
* File: Weekly PowerPoint [Link]
* File: Sample Scope Statements [Link]
* Weblink: [yEd](https://www.yworks.com/products/yed) FREE flowcharting software (Should be pre-downloaded prior to FAR Centre Activity)
  + From [yworks.com](https://www.yworks.com/products/yed)
  + Watching tutorial prior to FAR Centre session is strongly recommended

The most recent ‘PMPP Textbook List’ for all PMPP courses can be found in Moodle.

## Notes on ALL Learning Activities

Note that the learning activities in this course are ungraded, unless specified. All learning activities are designed to help you succeed in their assessments in this course, so you are strongly encouraged to complete them.

## Personal Activity:

The following activities are to be completed **before** your FAR Centre weekly session. Be sure to complete them to be fully prepared. Your familiarity with the topics and concepts will greatly help you participate with confidence during FAR Centre activities.

#### Personal Activity 3.0.1: Watch Instructor Recorded Video

This weekly video is a preview of the topics to be studied for this unit. They are usually 15 to 30 minutes and have a supplemental PowerPoint file. You may find this, like many students, to give you an edge in retaining the content you are ‘about to read’.

* Watch the video here: [link to file added when available].
* Find the supplemental PowerPoint file here: [link to file added when available].

#### Personal Activity 3.0.2: Read Fundamentals of PM (FPM), Chapter 4

This chapter of FPM is the second topic of the ‘10 Knowledge Areas’ of project work. This chapter considers how a scope is developed. Namely, developing the deliverables of the project through the culture of the organization. You will find this to offer an additional perspective to the All In One textbook.

#### Personal Activity 3.0.3: Read All In One (AIO), Chapter 5

Similar to content in the FPM text, AIO offers a more detailed depiction of the development of the Scope Management Plan. This goes beyond just the creation of the Preliminary Scope Statement, completed last week. This includes the process of collecting the project deliverables, but now incorporates a slightly more detailed Work Breakdown Structure (WBS) and includes an Approval/Change Control System.

#### Personal Activity 3.0.4: Watch All In One (AIO) video, “Change Control”

This video is supplemental to Chapter 5 and offers a pleasant recap of the necessary steps for an Approval/Change Control System. Change control systems may seem daunting, but this video shows how simple they are.

## Topic 1: The Scope Management Plan

The Scope Management Plan is a system to seek out the deliverables of a project and to obtain approval from the appropriate stakeholders. Commonly, organizations (or certain people within them) know what they want, but struggle to define a clear path to achieve results.

Creating a Scope Management Plan is not as complicated as it seems. It is simply denoting a plan on how to collect the necessary inputs and then how you plan to seek approvals and control the process(es) from there.

#### FAR Centre Activity 3.1.1: Draft a Scope Management Plan

Form teams of 3 to 5. Each team is to select a Scope Statement from the file, “Sample Scope Statement” [link to file added when available] and then draft a Scope Management Plan using the ‘bullet points’ found in AIO, pages 175 and 176. The resulting plan should have at least 10 bullets/statements.

This exercise starts with a (provided) PRELIMINARY Scope Statement. Your team will need to creatively fabricate some details (but try to make it all ‘believable’) to fill in additional project requirements.

#### FAR Centre Activity 3.1.2: Scope Management Plan Presentations

After 3.1.1 is completed, your team will share the results with the class. Students will have an opportunity to ask questions, offer comments, and help each team to refine their final version. This should take about 3 to 5 minutes per team.

Each team will have a final version that you (every student) will write in your Week Recap Status Report.

* Facilitator Note: Provide feedback to the instructor on each student’s helpfulness and level of participation.

## Topic 2: Collecting Project Requirements

It is common that the Project Sponsor (usually the initiating person that asks you to take on the project) has a rough idea of what is desired to be accomplished, but it is up to you, as the project manager, to seek the details and facilitate the final approval to proceed.

In a real-world setting, you will seek these inputs from several sources, as discussed in AIO chapter 5. There may be more that you can come up with, too. This exercise requires a moderate level of creativity as you team must ‘create’ the details. This could prove to be quite fun, in matching real-world situations that are ‘strange/unusual’.

#### FAR Centre Activity 3.2.1: Denote Project Requirement Sources

Returning back to your groups, your team, again using believable fiction, formulate a list of possible sources that could contribute to the best collection of project requirements. Consider the options listed in Chapter 5 of AIO.

#### FAR Centre Activity 3.2.2: Share your ‘Sources’ results with the class

Your team will share your list of sources with the class. After all presentations are complete. Each team will convene and have 2 minutes to add to their list. Discussion will then take place for each to share the additions, and why they were added.

## Topic 3: Creating a WBS

A Work Breakdown Structure (WBS) is NOT a list of tasks. It could be, but it is designed to visually represent the actions that will achieve the deliverables. It is commonly presented in a list, or better still, a hierarchical chart.

A key element of the WBS is the numerical system found in each and every box. (For those wondering, one reason why this is done is to have every WBS box ‘that has a budget need’ to have the WBS number LISTED ON THE BUDGET line item.) This number system is used throughout the project to reduce confusion between similar steps/processes/tasks.

Templates for a WBS can be found in numerous places. Many use Microsoft’s Excel and then start with Insert/Smart Art to easily create a professional looking WBS ‘hierarchy’. (A web search for a tutorial could help.) Again, it is critical to have a numbering system in every box.

#### FAR Centre Activity 3.3.1: Create a Work Breakdown Structure (WBS)

Returning to your same teams, create a WBS for your project. The WBS is NOT a list of tasks, but focuses on the *deliverables* of your project, and may better represent the Project Phases.

You will likely have to fabricate the details of the WBS (as always, try to make them ‘believable’). Consider the sample in AIO Figure 5-1, or use a template from a web search.

AIO, page 190, can offer some additional content ideas. For the sake of the assignment, please try to have a total of about 20 boxes on your chart. (The Instructor is more concerned about the ‘shape, format, and general topics covered’ than the exact content of each box.)

#### FAR Centre Activity 3.3.2: Present your WBS

Your team will share your WBS results with the rest of the class, including justifications for the shape/content of your chart. Discussion is to include ideas for improvement. (Seeking input for improvement and/or verification is a normal project management task… in real-world settings, you would share the WBS draft with certain stakeholders, who in turn, would offer improvement suggestions… ending in a final version that is ‘agreed upon and approved’.

## Topic 4: Flow-Charting a Change Control System

Your team will collaborate to draw a flow chart to denote the steps of your *change control system.* It is wise to review the AIO’s description of the standard tasks, but you need to visually present these in a flow chart.

This exercise needs flow-charting software. It is strongly suggested that you are familiar with building a flowchart PRIOR to attending this FAR Centre session. The easiest option is Excel (you can web search tutorials, if needed, likely using Smart Art).

But the best option (and FREE) is by downloading yEd from [yworks.com](https://www.yworks.com/products/yed). After watching one or two brief tutorials, you can create a flow chart with ease (and to fit varying needs, not just for this assignment).

#### FAR Centre Activity 3.4.1: Build a Change Control Flow Chart.

In your groups, create a flow chart (in Excel or yEd) to document the steps for scope approval through your stakeholder network (Thus, this is your change control system.) Be sure to include a ‘loop’ for recording change requests (in the form of a Change Control Log[[2]](#footnote-2)) and processing them for approval/denial (these would be in the form of ‘decision points’ for Stakeholders).

#### FAR Centre Activity 3.4.2: Share your Change Control Flow Chart

Much like 3.3.2, your team will share your flow charts with the rest of the class, including justifications for the shape/content of your chart. Discussion is to include ideas for improvement. (Again, this is a normal project management task… in real-world settings, if there was no change control system, you’d have to create one. This is because of the impact of change requests/needs. You would share the change control system with stakeholders, who in turn, would offer improvement suggestions. This final result would be that all stakeholders would agree and approve of this system… and all could use it.)

## Unit 3 Summary

In this first unit, you have had the opportunity to learn about…

1. Organizations exist to accomplish something.
   1. They do so through processes
2. Processes must be established (or revised) for organizations to achieve their desired deliverables.
3. Project management is the tool to oversee process creation (or evolution).
4. Scope management helps projects stay ‘on target’ to achieve those deliverables.
   1. This is achieved through a documented Scope Management Plan.

## Assessments

### *Assessment 3.1: Written Assignment*

Consider the scenario presented below and draft a new Scope Management Flow Chart for the given scenario, but this time, include (at the beginning) the process flow chart steps for the Charter Statement approval, too.

And like many assignments this week, you will likely need to fabricate the details. The format and depth of your flow chart is what the Instructor is looking for.

For all of the above, use at least 2 APA-formatted citations for any source, including those that offer guidance in formatting.[[3]](#footnote-3)

You will upload this into Moodle for grading.

Click here for scenario. [link to pdf or page]

### *Written Assignment Grading Criteria:*

The grading of the Written Assignment will be based on the PMPP Standard Rubric:

|  |  |  |  |
| --- | --- | --- | --- |
| **Syntax and Spelling:** | |  |  |
|  | Emerging (0 to 6 points) | Developing (7 to 8 points) | Mastering (9 to 10 Points) |
|  | Student appears to not have checked for spelling and grammatical errors. Sentence structure is difficult to follow. Basic composition rules may not be followed. APA formatting has errors. | There are limited minor errors in spelling or grammar. The content may not flow smoothly and may be disjointed in thought and application. APA formatting is adequate. | There is either no errors or just a minor error in spelling or grammar. The content flows well and are a solid example of proper composition elements of style. APA formatting is exemplary. |
|  |  |  |  |
| **Thorough Answers to Assignment:** | |  |  |
|  | Emerging (0 to 21 points) | Developing (22 to 30 points) | Mastering (31 to 35 Points) |
|  | Student may have simply just answered the assignment demonstrating limited knowledge of the content, lacked depth, and offered limited (or no) sources. Major points of the assignment are not developed. | Student answered the minimum of the assignment and offered undeveloped use of sources. They may need to cultivate some portion(s) of the assignment more in order to head toward mastery. | Student has clearly mastered the assignment content and properly used sources to thoroughly prove their thesis Content is clear and concise, without being too wordy; finishing with a great conclusion. |

|  |  |  |  |
| --- | --- | --- | --- |
| **Personalization/Examples:** | |  |  |
|  | Emerging (0 to 21 points) | Developing (22 to 25 points) | Mastering (26 to 30 Points) |
|  | Student offers shallow or no personal examples to support their thesis. | Student shows personalization, but may be offering 'someone else's story' or one that doesn’t fit the assignment. Application of the content may not be thoroughly explained (to fit their thesis). | Student offers are least one strong example from personal experience, and fits well with their thesis and conclusion. Impact on faith may be included in the answer. |
|  |  |  |  |
| **Professional Presentation:** | |  |  |
|  | Emerging (0 to 9 points) | Developing (10 to 12 points) | Mastering (13 to 15 Points) |
|  | Paper is offered in an acceptable presentation but lacks consistent formatting. Paragraphs are too large. Word choice may not be appropriate for the ‘business style’ required for this course. Overall appearance detracts from the content. | Paper is better than an ‘acceptable’ presentation. Paragraph size is appropriate (limited to 4 sentences each) and word choice is fitting. Overall appearance is on the brink of greatness. | Paper is very professional looking. Paragraphs are well formulated. Excellent word choice and appearance add to the overall content. Total appearance is exceptional. |
| **Sources:** | |  |  |
|  | Emerging (0 to 5 points) | Developing (6 to 8 points) | Mastering (9 to 10 Points) |
|  | Student use of citation(s) does not comply with the assignment minimums; and sources are (just) from textbooks. | Student uses minimum quantity of required citations, but a majority are from the textbook(s). | Sources are rarely from textbooks and often from creative sources. |

### *Assessment 3.2: FAR Centre Participation*

You are expected to complete your reading assignments prior to class. Then during class, opening (with honesty and respect) join in on class discussions, small group discussions, and presentations.

Plus, you will submit a Weekly Recap Status Report (uploaded onto Moodle), using the template provided. You can score up to 100 points for this.

### *FAR Centre Participation Grading Criteria:*

Using the TWU general guide to grading found in the syllabus, the Facilitator will provide a score (and any applicable feedback) to the Instructor, namely, an evaluation of each student’s participation in the weekly sessions. Since these cannot be made up, attendance is mandatory.

For the Facilitator feedback, scoring is based on the below rubric.

* Attendance: 0 points for an absence, 10 for being late, and 25 for full attendance
* Attentiveness, up to 25 points
* Quality of class & small group discussions, up to 25 points
* Quality of presentations, up to 25 points
  1. In the event of group presentations, the group will share the same score

Plus, you will submit a Weekly Recap Status Report (uploaded onto Moodle). You can score up to 100 points for this.

## Checking your Learning

Before you move on to the next unit, you may want to check to make sure that you are able to:

* Draft a Project Scope Management Plan, including:
  + Process identification
  + Process flow-charting
  + Data collection for deliverables
  + Stakeholder inputs and approvals
* List the standard channels to collect the project deliverables (knowing where to look expedites your collecting)
* Create a WBS to visually display the deliverables
* Build a change control system flow chart that accommodates an organizational approval system, including initial project approvals AND change request approvals/denials

1. Or even a list of deliverables by department. Again, the focus is on the deliverables and not JUST the tasks. [↑](#footnote-ref-1)
2. Again, usually in the form of a Excel file that is password protected. [↑](#footnote-ref-2)
3. Hint: Where are you getting your template? And, did you view any tutorials? [↑](#footnote-ref-3)