

Skills USA Checklist for Aligning PM Education to a CTSO Fundraiser

(from Skills USA website, "Champions at Work" Chapter Fundraising Checklist)

1. Introduction to PM in Context of the Project

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| 1.1. Terms and Process Groups | Obtain a copy of your school policy regarding fundraising |
| 1.2. Scope/Cost/Time Dilemma | Have students brainstorm ways to raise funds |

2. Define the Scope

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| 2.1. Define the Problem or Opportunity | |
| 2.2. Imagine a Vision | Have students brainstorm ways to raise funds |
| 2.3. Agree on a Mission | |
| 2.4. Scope Inclusions and Exclusions | Be familiar with any school insurance available to protect against liability |

3. Gain Stakeholder Support

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| 3.1. 3.1 Identify Stakeholders | |
| 3.1.1.Owners | |
| 3.1.2.Customers | |
| 3.1.3.Sponsors | |
| 3.1.4.Other | Request approval of any contracts for goods or services |
| 3.2. Define Stakeholder Interests and Expectations | |

4. Develop the Project Charter (use Template)

5. Create the Work Breakdown Structure

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| 5.1. Outlining Major Tasks | Inventory merchandise to be sure you received what was ordered
Check with companies for their return policy of any unsold goods
Require strict accounting of all funds handled Provide adult supervision for all fundraising activities |
| 5.2. Breakdown Sub-tasks | |

6. Develop a Budget Plan

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| 6.1. Revenues | |
| 6.2. Costs | |

7. Develop a Project Schedule

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| 7.1. Beginning and End Timeline/Calendar | Establish clear timelines and deadlines for the fundraiser |
| 7.2. Calendar Key Dates for Deliverables | |

8. Develop an Organization Structure

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8.1. Define team roles and responsibilities	Have students organize work teams so a few students don't do all of the work
8.2. Build Team (and Communications)	
9. Obtain and Manage Resources	
9.1. People	Plan for safety and monitor safe work practices during all activities Employ a code of conduct for students who are participating
9.2. Things	
9.3. Money	Have students implement good financial procedures Assign one or two people to handle all receipts, expenditures and accounting Establish deadlines for any money to be turned in Require receipts for any chapter purchases Require two signatures on checks if your SkillsUSA chapter has a checking account
10. Assure Quality	
10.1. Product Quality Standards	
10.2. Meet or Exceed Stakeholder Expectations	
11. Achieve the Deliverables	
11.1. Pacing Against Deliverables Dates	
11.2. Celebrate Milestones	
12. Measure and Communicate Performance	
12.1. Reports on Progress and Deliverables	
12.2. Celebrate and Share Success	
13. Conduct Project Review for Learning and Continuous Improvement	
13.1. What Went Well	
13.2. What Could Be Improved	
13.3. What Resources Would Support Improvement	
13.4. How Would Improvement Be Measured (Indicators)	
14. Assure Sustainability Issues are Addressed (Use Guide)	