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| Mid Level Capstone Study Guide |
| Release 2.0 |

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**Mid Level Study Guide**

***Capstone Overview***

The Capstone is the culmination of your project management studies. This five day program is an assessment of your skills. It is not intended as a class where knowledge is imparted, but rather a validation of knowledge. It is a series of threaded activities around the requirements and design of the Palm Canyon Medical Center (PCMC) and the Mack Administration Building (MAB). A proctor will facilitate a series of exercises where you will demonstrate your project management acumen.

Using a rubric, the proctor will assess your skills by grading your work as an individual and as a team member. Exercises are conducted to ascertain not only your knowledge, but how you orchestrate that knowledge to get things done. Your primary function will be that of the Program Manager concerned with the requirements, design and construction of the MAB. To accomplish this task, you will be given five primary production documents/artifacts: a Participant Workbook, a Project Workbook, a Facilities Project Workbook, a Cafeteria Project Workbook and an IT Project Workbook. The majority of the Project Workbook is a collection of templates to record information; it also contains a listing of the Project Core Team and their Key Functions. From time to time, the proctor will offer handouts, or additional documentation required to complete exercises.

***What is expected/ How will I be evaluated?***

 In addition to the proctor offering directions to complete exercises, the Participant Workbook will also provide directions. For each exercise, five basic elements will be present, they include: Timing, Purpose, Directions, Program Artifacts and Briefing Topics.

While all five elements are important, participants should pay special attention to Project Artifacts. Beneath this, you will see: Inputs and Outputs. The Inputs represent those documents or artifacts which need to be reviewed prior to completing the exercise. The Outputs represent what you must produce at the conclusion of the exercise and are the major elements graded in the rubric. For instance, in the Output section for Exercise 1.0, it may list the following: Stakeholder management plan, Risk Register and Communications plan. In the rubric for Exercise 1.0, it would read: Did participants: create a Stakeholder management plan? Did participants create a Risk Register, and Communications Plan? The proctor will grade you individually and as a contributing team member. The aggregate team score comprises 40% of your final score, and the aggregate individual score is 60%. Individual scores will be based on your performance in an exercise and your performance in the team dynamic. The proctor will be looking for your project knowledge and processes, ability to make appropriate assumptions, external awareness, and entrepreneurship. Your ability to serve in a leadership role is equally important.

All of the exercises are based on teamwork. The proctor will ask challenging questions of individuals, but this is not a competitive activity. Participants who demonstrate skill in working collaboratively will achieve higher scores than those who do not.

Please note that in addition to aforementioned production documents, you will be given a series of artifacts, communications and other information to complete the exercises and project. Some of the information may be incomplete or incorrect, this is intentional; if this is the case, make assumptions, document the assumptions, and proceed.

You will also be expected to:

* Create the required documents for each phase of project management
* Review and add to any documents provided
* Continually update documents as needed
* Demonstrate presentation, leadership, facilitation and communication skills
* Think creatively and apply project management skills

***Roles***

For most exercises, you will play the roles of both the Project and Program Manager, unless otherwise stated. All project management documents, schedules, estimates, and all status reports must be integrated and stored in your Project Notebook. At the conclusion of the time allotted for each exercise, teams will debrief the issues, the action they took, and the rational for their actions. Each exercise will be managed with the additional following team roles:

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| **Role** | **Description** |
| Facilitator/ Timekeeper  | Leads the team to decisions, manages time and the team process. |
| Scribe | Documents the team’s responses to the exercise on a flip chart or other medium. |
| Briefer | Presents a brief summarizing the team’s Outputs (assigned deliverable), manages questions from the proctor/program sponsor/other participants. |
| Process Monitor | Observes and reports on how the team works as a unit; makes recommendations on how the team could operate more efficiently. Ensures the team takes breaks during exercises. Because the exercises can be involved and intricate, teams often divide tasks, or elect particular team members to work on specific problems based on their strengths. |

***Logistics***

The Capstone correlates with the instructor led classes you attended. If you attended the Mid Level classes, you should be attending a Mid Level Capstone. Each day, the Capstone is held from 8:00 AM to 4:30 PM with an hour for lunch. Teams are expected to independently manage their time and breaks. With the exception of lunch, breaks will not be designated for you. Work with your team to establish work processes and time management. ***If you have any conflicts with these times, you must let the proctor and your supervisor know at the beginning of the week.*** You may miss up to three hours with an excused absence, however you will receive a score of zero for any missed activities; the proctor may allow you to complete the work you missed if time allows.

To pass with a qualifying score, you must complete all activities, and demonstrate a thorough knowledge of project management techniques. The proctor will not be able to provide you with a score at the end of the Capstone. The completed rubric is returned to the Academy for tabulation and final scoring. However, the proctor will provide feedback and assistance to any participant who is struggling early enough in the Capstone to remediate issues. If a participant does not pass the Capstone on the first attempt, he will be provided specific feedback along with suggested developmental activities. A participant may retake the Capstone up to twice in one year, but there must be at least 60 days between Capstone attempts. A participant will receive an electronic Capstone Completion Certificate and instructions for applying for FAC-P/PM Certification once the Capstone evaluation is passed.

Because you will not have time during the day to attend to your normal work duties, please make alternate plans to cover for your daily deliverables. Finally, please make travel arrangements that allow you to attend the entire Capstone. Make sure you are there 8:00 AM Monday morning, and plan to finish at 4:30 on Friday.

***Preparing for the Capstone***

The Capstone is a very challenging event; it is intensive and can be stressful. To ensure you are successful, please review your materials from the instructor lead training. You should have four binders with the following titles: Concept Definition, Concept Planning, Development & Implementation, and Operations, Maintenance & Close Out. While it is important to work as a team, it is not recommended to rely on the knowledge of team members as the proctor will be asking questions of each individual to make sure the knowledge you acquired has been retained. Following, please see specific areas to study.

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| **Concept Definition*** Organize program/project activities around a federal program/project management life cycle
* Interpret US legal, government and jurisprudence practices as they relate to Concept Definition and programs/projects
* Compile the business requirements to support the development of a Strategic Statement of Need for a program/project
* Given a prioritized list, modify capability gaps and human performance deficiencies
* Develop an initial cost estimate to support a Strategic Statement of Need
* Compose the initial business case to prepare the Strategic Statement of Need for control gate review
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| **Concept Planning*** Lead a team to achieve program/project goals
* Develop a strategy to manage stakeholders as they impact program/project success
* Propose a program/project charter to obtain commitment from senior leadership
* Develop a requirements package that is traceable to the business need and identifies contracting specification
* Conduct a Preliminary Design Review (PDR) for a program/project
* Develop a project management plan for a program/project
* Develop an acquisition plan for a program/project
* Investigate logistical concerns and their impact on a program/project
* Develop a product-oriented work breakdown structure (WBS) that defines all the work required to accomplish the scope of the program/project
* Develop an integrated master schedule that identifies the tasks and resources required to accomplish the scope of the program
* Develop a sustainable cost estimate to support a program life cycle within the context of the capital budget process
* Prepare a plan for managing quality in programs/projects
* Create a risk management plan and the prioritized risk with response strategies for a program/project
* Establish a performance baseline for earned value management (EVM) as it pertains to the program/project
* Construct a change management plan for a program that incorporates the change management plans for the projects
* Write program specifications in program solicitations
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| **Development & Implementation*** Identify Business requirements related to the program or project
* Recommended solutions for capability gaps and human performance deficiencies
* Execute concept solution selection
* Create a cost estimate integrating contractor data
* Document processed for Operations an& Maintenance transition
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| **Operations, Maintenance & Closeout*** Transfer management responsibilities for programs/projects to the operations manager
* Describe the process for closing out a program/project
* Connect the results of a final EVM report for a program/project to the benefit of another program/project
* Lead a lessons learned workshop
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***Incidentals***

Pens, paper, highlighters and post-its will be provided. You may bring the following items to assist you during the Capstone:

* Lap-top computer (Note: internet connection is not available)
* Any reference material including notes
* Snacks, water, coffee, tea, sodas, etc.
* EP/PPM Manual

As stated earlier, a period of one hour is provided for lunch, however, many groups have opted to work through lunch to complete exercises. In these cases, lunch is ordered in. Please note that some groups have opted to work on, or complete exercises at the conclusion of the Capstone day.

Make sure you get a good night’s rest and your travel distance is minimal.

***Final Pointers***

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| **Presentation Skills*** Make eye contact with the audience
* Limit hand movements
* Refer to specific points on your flip chart (don’t simply read items listed)
* Speak clearly as if your were talking to a friend
* If you are nervous, say so, and start over
* Pause to collect your thoughts. Try to avoid—“umm,” “ahh,” or “errr,” to fill silence
* Ask questions to take the burden of talking off of yourself
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| **Time Management*** Establish how the team will manage breaks and time
* At the beginning of each exercise, plan your tasks for the time allotted
* Actively use the timekeeper role
* Look for opportunities to divide or collaborate on tasks
* Look for team member strengths and exploit them
* Look for techniques other teams are using
* Go after high priority items first
* If you don’t finish an exercise, explain why
* Learn how your team works best
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| **Team Skills*** Treat all team members with respect
* All team member ideas are good ideas
* Encourage/Praise each other
* Thank each other
* Support team members outside of class
* Recognize strengths of team members and use to your advantage
* Share information freely
* Socialize outside of class
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