



UTO Project Management Toolkit



**UNIVERSITY
TRANSFORMATION
OFFICE**

CENTRAL MICHIGAN
UNIVERSITY

UTO Project Management Toolkit

A self-serve toolkit to help you manage your own project using simple, practical templates

Updated 05/01/26



**UNIVERSITY
TRANSFORMATION
OFFICE**

CENTRAL MICHIGAN
UNIVERSITY

Why The PM Toolkit Exists

The Reality

- Not every project can have or needs a dedicated UTO project manager
- Teams are often asked to lead their own projects
- Work can become unclear, unorganized, or slow to move forward

The Goal

- Provide simple, practical tools
- Help you take ownership of your project
- Enable you to manage your work independently using a clear, consistent set of tools



What This Toolkit Is

This Toolkit Is:

- Simple and practical
- Designed for anyone leading or coordinating a project
- Flexible and easy to use
- Meant to help you manage your own project



This Toolkit Is NOT

This Toolkit Is NOT:

- A full project management framework
- Meant to slow you down
- Something you must use perfectly
- A replacement for additional support when a project is complex, high-risk, or cross-functional



How the Toolkit Works Together

Run a project in a few simple steps:

1. **Project Charter** → Define the purpose, scope, and goals
2. **Project Tracker** → Manage tasks and milestones
3. **Communication Plan** → Keep stakeholders informed
4. **Project Log** → Track decisions, risks, and issues
5. **Agenda Template** → Run effective meetings
6. **Lessons Learned** → Capture improvements for next time



Use Microsoft Teams as Your Project Hub

We encourage you to create a Teams channel for your project

- Keeps all communication organized in one place
- Reduces reliance on email
- Makes it easy to collaborate and stay aligned
- Provides a central location for your project documents

Use Teams to:

- Share and store your PM toolkit templates
- Keep project updates and conversations organized
- Maintain a single source of truth for your project

Agendas and Updates

- We encourage posting agendas and updates in Teams instead of email
- This keeps everything visible and accessible to the team



CENTRAL
MICHIGAN UNIVERSITY

Project Charter

Template | Example

Why It Matters

- Aligns everyone on the purpose of the project
- Defines what success looks like
- Defines clear outcomes and goals for the project
- Prevents confusion later

At a high level, it helps you:

- Clearly define your project
- Set expectations early
- Get everyone on the same page



Using the Project Charter

This is the same Project Charter used by the University Transformation Office (UTO)

- You are *not* expected to complete every section
- Focus on the key areas that help define your project—delete the rest!
- The charter is a guide and can be updated as the project evolves—updates should be discussed and agreed upon by the project team

Start with:

- **Purpose** → Why are we doing this?
- **Scope** → What's included (and what's not)?
- **Success Criteria** → What does success look like?
- **Key Milestones** → What are the major checkpoints or deliverables?

This is a living document, not something that has to be perfect on day one!



CENTRAL
MICHIGAN UNIVERSITY

Project Tracker

Template

Why It Matters

- This is your main working document
- Keeps tasks, owners, and timelines clear
- Helps your project stay organized and moving forward

How to use it:

- Track key milestones at the top
- Manage detailed tasks below
- Determine who will take ownership of each task and agree on due dates
- Update the status regularly



Communication Plan

Template

Why It Matters

- Keeps the right people informed
- Prevents surprises
- Helps ensure alignment throughout the project
- Ensure your broader team is aware of the project, even if they are not directly involved

Focus On Key Stakeholders:

- **Who** needs updates – even if they are not directly involved in the project
- **What** they need to know
- **How often** to communicate
- **How** communication will happen



Project Log

Template

Why It Matters

- Keeps track of important decisions and issues
- Helps you stay aware of risks
- Provides a record of what happened and why

What To Track:

- **Decisions** → What was agreed upon
- **Risks** → What might impact the project
- **Issues** → What is currently impacting the project



Project Log

Keep It Simple!

- Not everything needs to be logged, focus on important decisions
- Capture items that impact your project
- Keep entries short and clear
- Track decisions that may need to be referenced, explained, or revisited later
- Define what High, Medium, and Low mean for your project so risks and issues are rated consistently



Agenda/Meeting Minutes Template

Template

Why It Matters

- Keeps meetings focused and productive
- Ensures time is used effectively
- Drives accountability and follow-through

Key Sections:

- **Agenda Topics** → What will be discussed
- **Action Items to Review** → Status of previous work
- **New Action Items** → What needs to be done next
- **Key Decisions / Summary** → What was agreed upon



Agenda/Meeting Minutes Template

1. Before the meeting:

- Send or post the agenda at least 24 hours in advance
- Clearly define discussion topics

2. During the meeting:

- Take discussion notes
- Review previous Action Items
- Capture new tasks and next steps

3. After the meeting:

- Complete Key Decisions /Summary
- Update new action items and add them to your Project Tracker
- Record attendees
- Share the meeting minutes and updated action items with the team within 24 hours

Use this as both your meeting guide and your meeting record!



Project Celebration and Announcements

Why It Matters

- Recognizes the work completed by the team
- Shares outcomes and accomplishments
- Helps build momentum for future projects

Consider Sharing:

- What was completed
- What changed or improved
- Who contributed to the work
- Any next steps or follow-up items

Take time to acknowledge the work and communicate success... and everyone loves a pizza party! 🍕



CENTRAL
MICHIGAN UNIVERSITY

Lessons Learned – Project Wrap Up

Template

Why It Matters

- Helps improve future projects
- Captures what worked and what didn't
- Prevents repeating the same issues

Focus On:

- What worked well
- What didn't work
- What to do differently next time



Lessons Learned

Approach:

- Schedule a Lessons Learned meeting after project completion with your team to review key takeaways

Tips:

- Consider sending the template in advance to give your team time to think through their responses
- You can also ask team members to complete and send it to you individually
- Offering different ways to give feedback helps capture input from people who may not be comfortable sharing in a group setting

You know your team best, use whichever approach will achieve the best results!



CENTRAL
MICHIGAN UNIVERSITY

Questions or Need Support?

For questions about the toolkit or whether your project may need additional support, contact:

universitytransformationoffice@cmich.edu



CENTRAL
MICHIGAN UNIVERSITY