



E15 - SHIFT Program Management

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2026 MSBO Annual Conference



Introductions



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(OCM) Lead



Agenda

01 Differences in perspective

02 Structures for success

03 Tools for daily oversight

04 Keeping score



Program vs. Project Management

Distinctions and opportunities



Program Management and Project Management

Program Management	Project Management	Notes
Oversight	Tasks	Project Management focuses on individual efforts vs. overall direction
Coordination	Budget	Program Management aims to level out individual impacts
Value realization	Timeline	Project Management is more sensitive to individual dates than holistic impact
Asks, “How does this benefit all?”	Asks, “Is this initiative working?”	Individual projects may be impacted in order to realize the anticipated benefits for the District as a whole



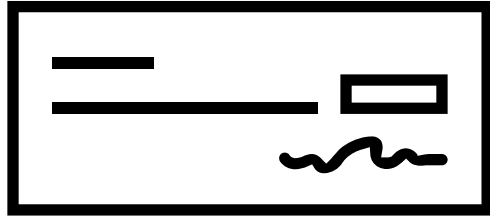
How this might look in your District

Key drivers for such initiatives might include:

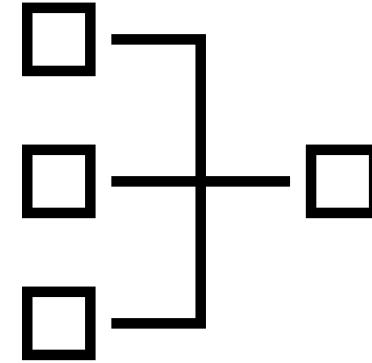
- Multi-year initiatives such as ERP implementations, budget reforms, bond/facility projects, grants, etc.
- Working with multiple vendors across many different teams
- Increasing public accountability and board oversight
- Fixed calendars for school and fiscal years



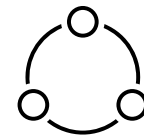
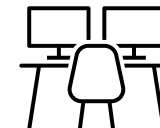
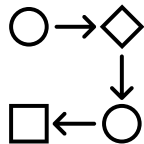
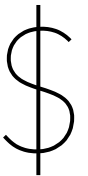
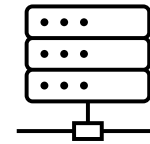
New budgeting system vs. financial systems modernization



Accounting System



Financial System





What does Program Management do?



Governance and decision-making

Strong governance is necessary for important decisions, and timely action needs to be taken



Cross-project dependencies

Resource and capacity conflicts may impact individual projects, especially those impacting frontline staff

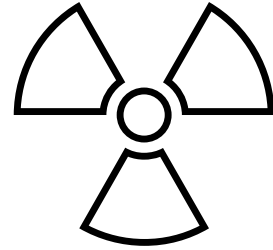


Risk escalation

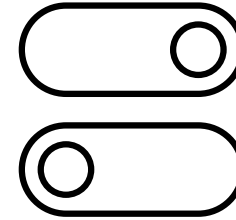
Benefits realization needs to be calculated across all efforts; calculating the risk to the District is more important than time/budget in some cases



What do Program Sponsors need to know?



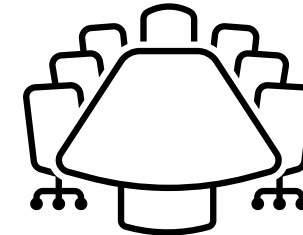
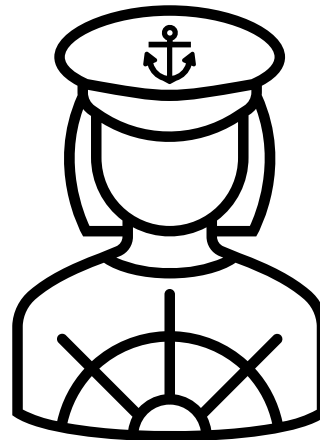
Decision
owner



Risk
acceptor



Sponsor



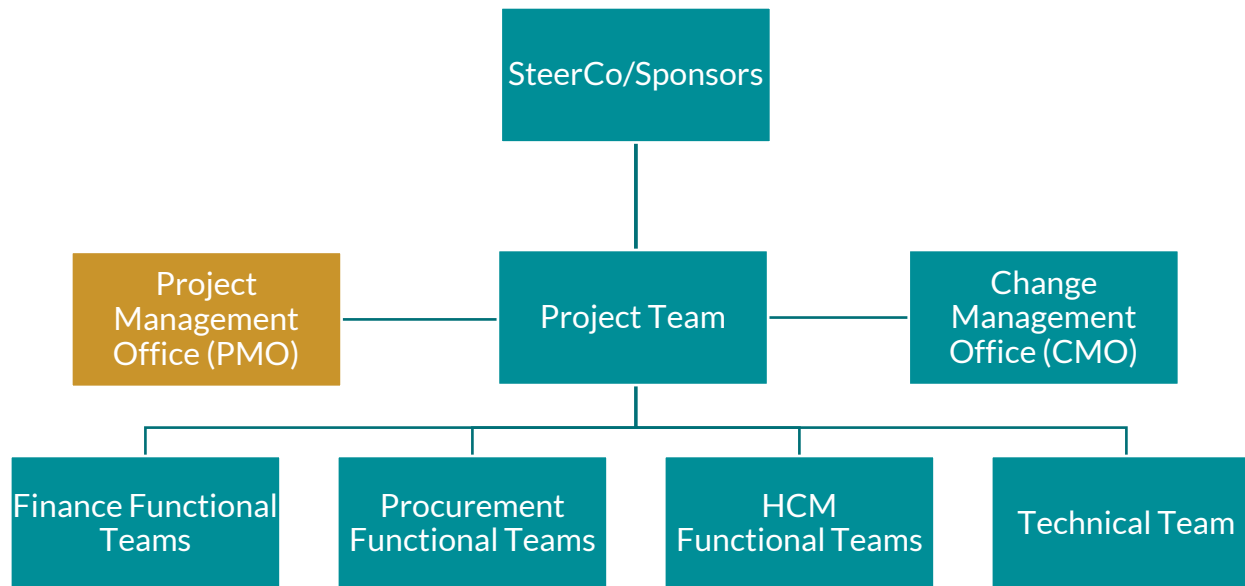
Board
translator



Structures for success



Sample roles and responsibilities

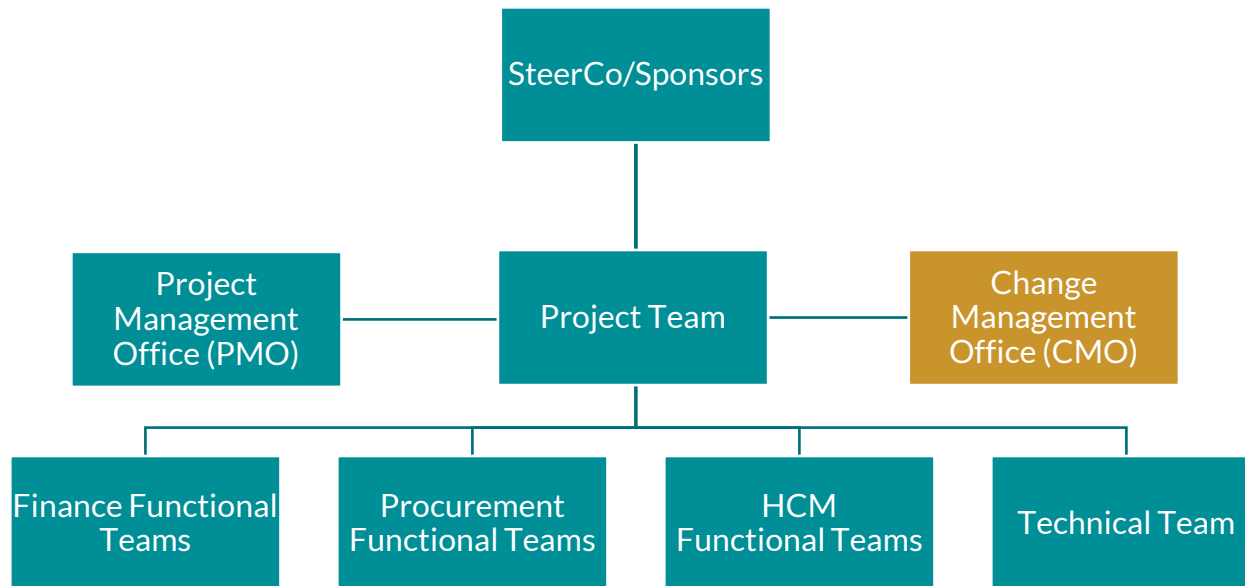


Project Management Office (PMO)

- Define standards, decision rights and escalation paths
- Consolidates project status, risks and issues
- Identify cross-project resource constraints
- Tracks interdependencies between projects to prevent downstream impact
- Ensures risks are identified early and assessed consistently
- Regular status reports to SteerCo/Sponsors



Sample roles and responsibilities



Change Management Office (CMO)

- Assesses the impact of change resulting from implementation activities
- Develops and executes change management strategies and plans
- Oversees execution of communications and training plans
- Manages change champion/change agent network activities
- Ensures stakeholder/end user needs are considered in implementation activities
- Regular status reports to SteerCo/Sponsors



Decisions you might need to make could impact...

- The way staff enter their time
- How teaching and learning is conducted
- How expenses are submitted
- How we manage physical security in our buildings
- Who begins a requisition
- How work flows across the District
- Relationships between schools and the Central Office
- Internal project perception



Tools for oversight



Program vs. Project Mgmt. (cont'd)

Project Management	Program Management
One objective	Multiple related outcomes
Defined start/end	Ongoing, phased
Single team	Multiple workstreams
Deliverables	Benefits & outcomes



Sample Monthly Program Governance agenda



Program status
overview



Workstream
highlights



Risks and
dependencies



Decisions required



Upcoming
milestones



Sample Weekly Program Management agenda



SCHEDULE AND
MILESTONES
REVIEW



CROSS-
WORKSTREAM
DEPENDENCIES



RISKS AND ISSUES
REQUIRING
ESCALATION



UPCOMING
DECISION POINTS



Long-view timeline inclusion items to consider

Months 1–2: Initiation

- Define vision & outcomes
- Confirm governance
- Build integrated roadmap

Months 3–9: Delivery

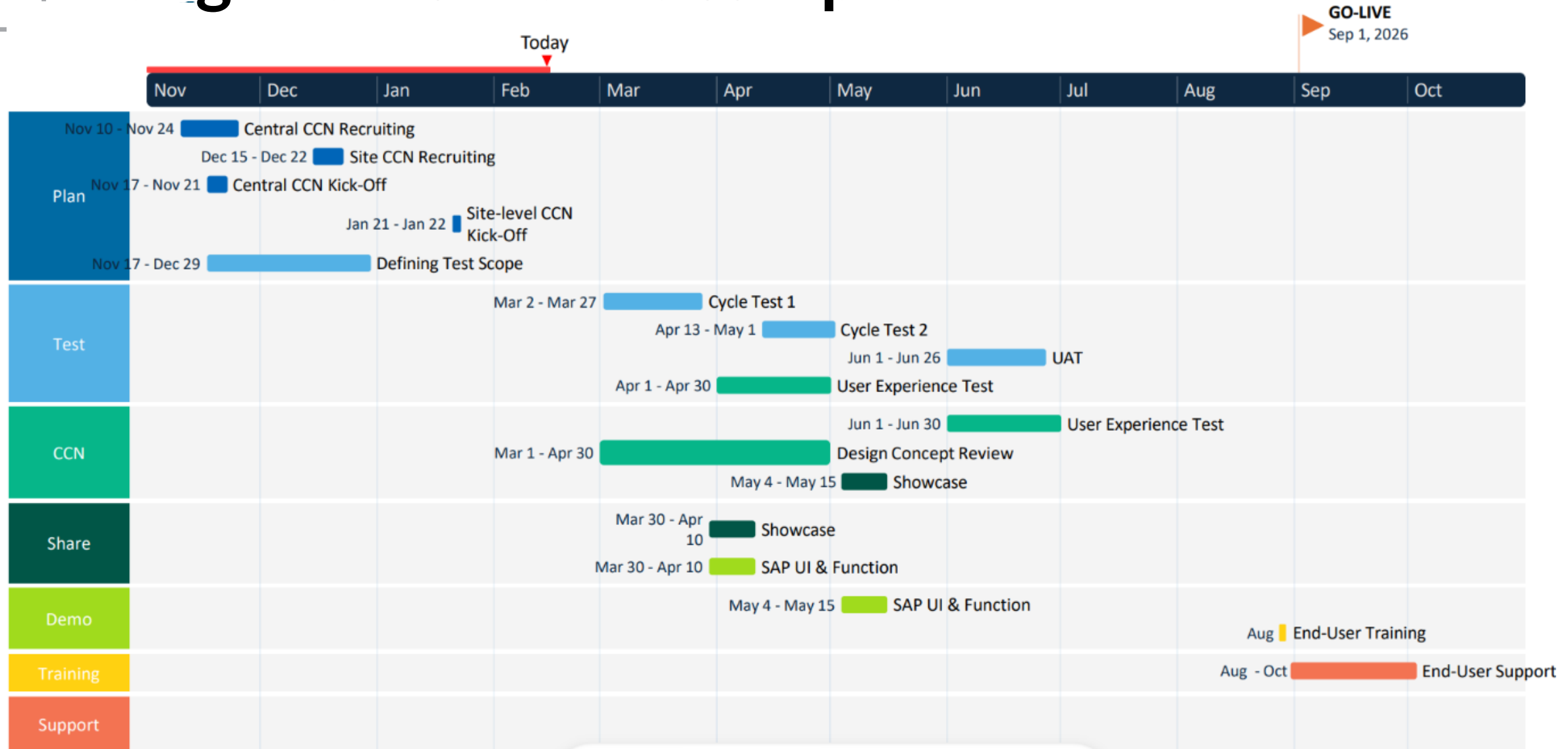
- Parallel workstreams
- Monthly steering decisions
- Quarterly recalibration

Months 10–12: Stabilization

- Go-Lives
- Training & adoption
- Benefits tracking

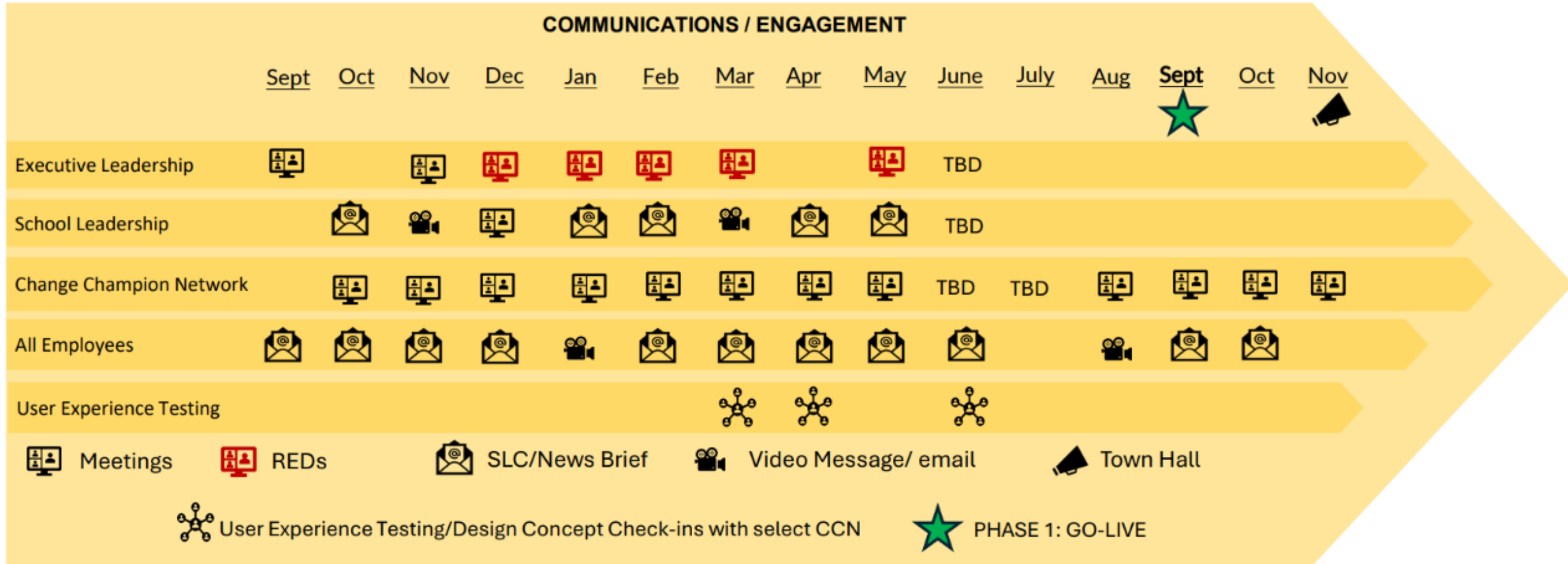


Long-view timeline sample





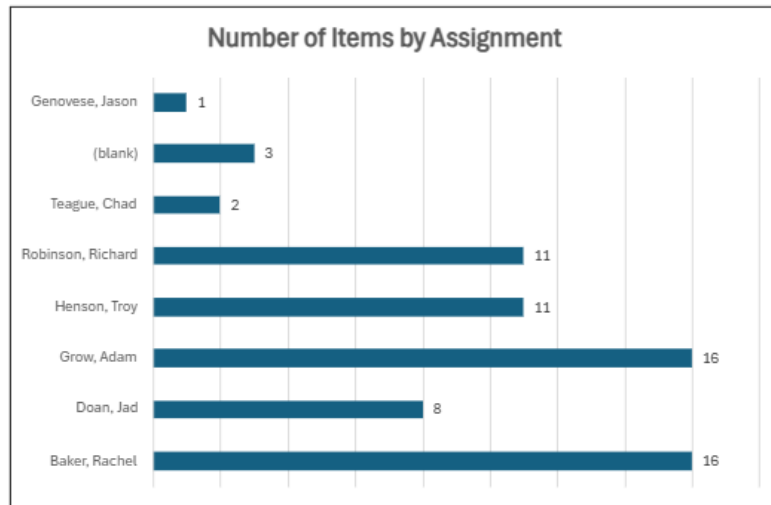
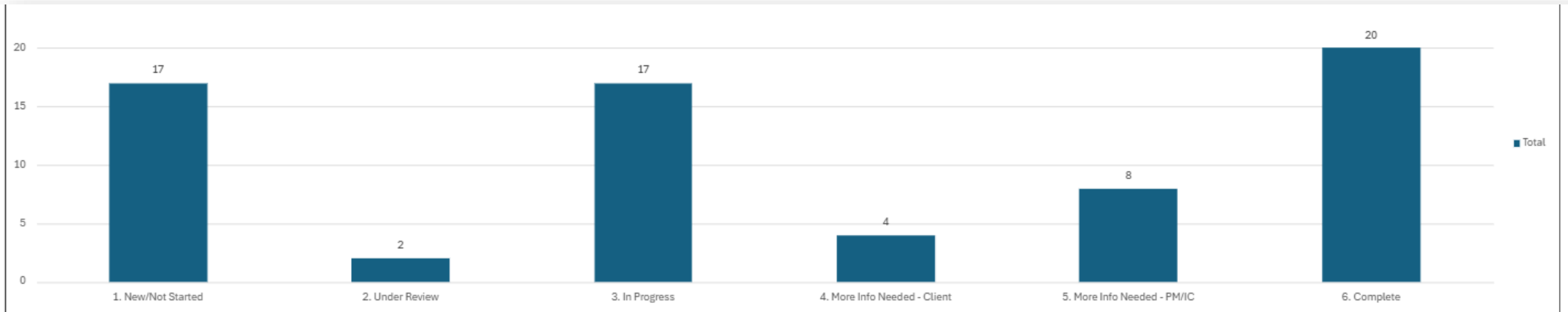
Workstream-specific info



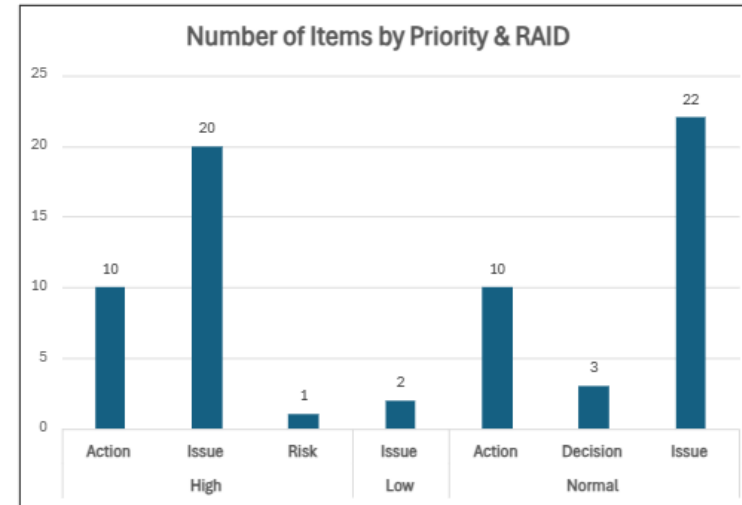
Executive Leadership: Cabinet Meetings & REDs



RAID Log



Status
1. New/Not Started
2. Under Review
3. In Progress
4. More Info Needed - Client
5. More Info Needed - PM/IC
6. Complete



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Decision Log example

Date	Decision	Owner	Impact
3/15	COA structure approved	CFO	Enables testing
3/19	Timekeeping solution chosen	CFO/CHRO	Employee badges
3/23	Training will be held over the summer	CFO/CHRO	Employee FTO
3/26	New Superintendent selection finalized	Steering Committee	Program risk
3/29	Fall go-live date chosen	CFO	School front office employee backlash



Energy commitments during the program



	Initiation & Planning	Discovery & Configuration	Testing & Training	Go-Live	Post Go-Live
Project Leadership	Medium	Low	Low	Low	Low
Project Manager	High	High	High	High	Medium
Functional Leads	Low	High	High	High	Low
Subject Matter Experts	Low	Medium	High	High	Low
Department Stakeholders	Low	Low	Medium	Low	Low
Change Manager	Low	Medium	High	High	Low
Technical Team	Low	Medium	Medium	High	Medium



Metrics that matter

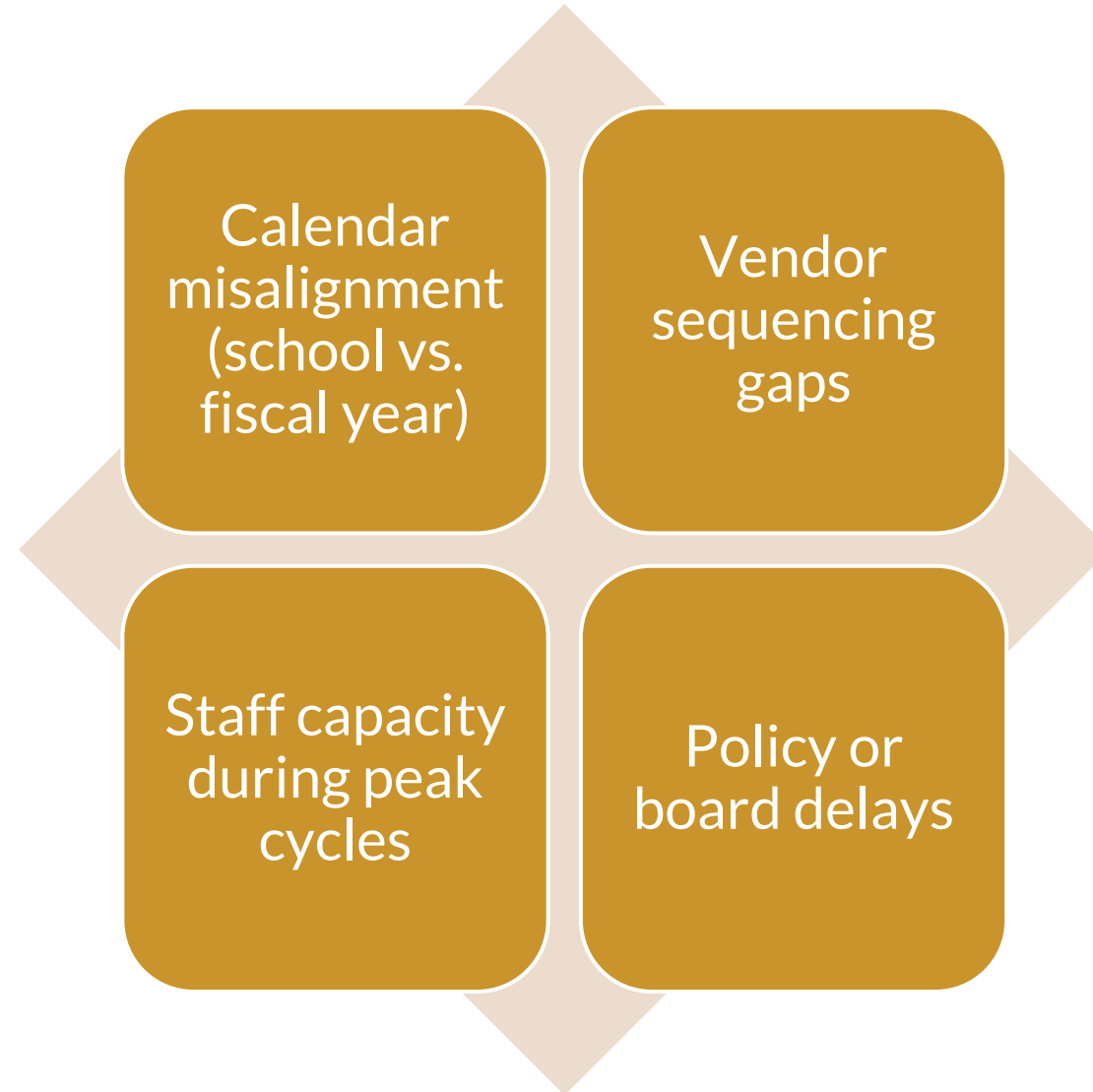


Defining success for your District

- Fewer surprises
- Faster decisions
- Coordinated vendors
- Clear Board communications
- Benefits realized vs. systems live



Key risks to over which Sponsors should remain watchful





Key takeaways

- Program management \neq more meetings
- Objective is to protect *outcomes* versus *tasks*
- Finance leadership is essential
- Effective governance is critical
- One integrated roadmap beats 10 individual project plans



THANK YOU!!

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