

**BACKGROUND**

The following is a checklist of the items and requirements to navigate the Project Management Framework Lifecycle. Please go to <https://pmo.gmu.edu> for additional information.

**PROJECT MANAGEMENT FRAMEWORK**

The Project Management (PM) Framework consists of:

- **Project Phases** – blocks of activities with their own purpose, deliverables, and required actions
- **Action Items** – activities that need to be completed to ensure compliance and uniformity for each project
- **Project Templates** – standardized forms that collect and report consistent data about the project

For more details, please review the Detailed 1-Pager.

Phase / Timing	TDX Request Phase 0 1 day	Intake Phase 1 2 - 4 weeks	Initiation Phase 2 4 - 8 weeks	Planning Phase 3 Based on project schedule	Delivery Phase 4 Based on project schedule	Closeout Phase 5 2 - 4 weeks
Portfolio Oversight			DC1	DC2	DC+	DCF
Requester	Requester completes forms & submits ITBA	Business Analyst (BA) reviews request & submits ITBA	Requester provides request to DC1	Requester provides request to DC2	Requester provides request to DC+	Requester provides request to DCF
IT Business Analysts (ITBA)		ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance	ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance	ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance	ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance	ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance
Project Governance		ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance	ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance	ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance	ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance	ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance
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Primary Responsibility	Requester	Business Analyst (BA), ITBA	Governance	Business Analyst (BA) & Project Manager	Project Manager	Governance & Project Manager
Action Items	Requester completes forms & submits ITBA	ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance	Governance provides DC topics and topics to Governance	ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance	ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance	ITBA provides ITBA proposal with financials, requirements, & ITBA services provided to Governance
PPMO Project Lifecycle Documents	TDX forms (requester)	1. Proposal Collaboration Worksheet (PCW) (ITBA) 2. DC1 1-Page (ITBA)	1. Project Charter (ITBA) 2. DC2 1-Page (ITBA)	1. Project Charter (ITBA) 2. DC2 1-Page (ITBA)	1. Project Status and Reporting (Ongoing) (ITBA) 2. Acceptance of Deliverables (ITBA)	1. Approval to Proceed (Optional) (ITBA) 2. Approval to Operate (Optional) (ITBA) 3. Closeout Document (ITBA)

**PROJECT SIZE**

Project size is determined by factors such as *cost*, *duration*, *project team resource requirements*, *project risk*, and *mandates*. This size dictates the minimum project management, status reporting, and documentation requirements. The calculation involves two sections:

1. What managing body will oversee the project? i.e., Will the project be managed by Domain Council or at the Enterprise Level?
2. What is the project size?

Please refer to the model for an accurate calculation.

**PROJECT PHASES**

Project Management Framework Lifecycle	Phase / Timing	TDX Request Phase 0 1 day	Intake Phase 1 2 - 4 weeks	Initiation Phase 2 4 - 8 weeks	Planning Phase 3 Based on project schedule	Delivery Phase 4 Based on project schedule	Closeout Phase 5 2 - 4 weeks
Portfolio Oversight				DC1	DC2	DC+	DCF

1. **\*Intake** – captures the business need and the ideal solution and kicks off the Project Management Framework Lifecycle phases
2. **Initiation** – document the project deliverables and resources needed to complete the project
3. **Planning** – develop the project schedule, assign resources, clarify risks
4. **Delivery** – do the project work (execution) and report on progress (monitor and control)

5. **Closeout** – capture lessons learned and assess project successes for future use  
\*Separate and distinct from the Project Management Framework Lifecycle

**ACTION ITEMS / DOMAIN COUNCILS**

The Detailed 1-Pager contains a comprehensive list of action items. For a detailed swim lane breakdown, please consult the dedicated Swimlane 1-Pager for additional information.

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Domain Council (DC) meetings govern phase transitions and establish the portfolio structure aligned with client area domains. Each council will be accountable for project activation approval, prioritization, and progress monitoring. There are four Domain Councils within the lifecycle:

- **Domain Council 1 (DC1)** – will approve a request that *SHOULD* become a project in the IT Domain Portfolio
- **Domain Council 2 (DC2)** – will determine *WHEN* a project should be started considering the full IT Domain Portfolio
- **Domain Council + (DC+)** – will approve any *SCOPE / SCHEDULE changes* to a project
- **Domain Council Final (DCF)** – will confirm *COMPLETION* of the project

**TEMPLATES**

The Mason IT PM Framework includes the following lifecycle templates to satisfy the project management deliverables.

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#	Template Name	Lifecycle Phase	Primary Responsible
1	Proposal Collaboration Worksheet (PCW)	Intake	ITBA, Business Analyst
2	Project Charter	Initiation	PPMO Project Manager
3	Planning Document	Planning	PPMO Project Manager
4	Project Status and Reporting (Ongoing)	Delivery	PPMO Project Manager
5	Acceptance of Deliverables	Delivery	PPMO Project Manager
6	Approval to Proceed (Optional)	Delivery	PPMO Project Manager
7	Approval to Operate (Optional)	Delivery	PPMO Project Manager
8	Project Closeout Document	Closeout	PPMO Project Manager

**PROJECT NAME** \_\_\_\_\_**PROJECT MANAGEMENT CHECKLIST**

This is a checklist of items for project managers to assist with tracking project management activities and complying with the PM Framework.

*Note: The PPMO performs italicized items.*

**INTAKE**

(Portfolio Request Lifecycle Intake)

- ITBA to complete the Proposal Collaboration Worksheet (PCW)
- ITBA to complete DC1 One-Pager
- ITBA to send completed proposal to Governance
- Governance to determine DC1 topics and notify appropriate parties
- DC1 Conducted
- Governance to send three emails:
  - DC1 Action Items
  - DC1 Minutes
  - Assigned Project # and Project Manager
- PPMO Post PCW in Project Inventory*

**INITIATION**

(Portfolio Request Lifecycle Accepted)

- ITBA to coordinate additional engagements
- PPMO to complete Project Charter*
- PPMO to submit charter to Governance*
- ITBA to complete DC2 One-Pager
- Governance to determine DC2 topics and notify appropriate parties
- DC2 Conducted
- Governance to send three emails:
  - DC2 Action Items
  - DC2 Minutes
  - Approved Project Start Date
- Project Charter Approved
- Post Project Charter in Project Inventory*

**PLANNING**

(Portfolio Request Lifecycle Scheduled / Active)

- Complete Kick-off Meeting
- Complete Project Planning materials*
  - Planning Document*
  - Project Schedule*
- Planning Documents Approved
- Post Planning Documents in Project Inventory*

**DELIVERY - EXECUTION**

(Portfolio Request Lifecycle Active)

- PPMO to execute the project and work on project tasks per schedule*

- Establish Steering Committees to include initial project kickoff and regular updates to leadership
- Complete Project Deliverables
- All Deliverable(s) Approved
- Post Acceptance of Deliverables in Project Inventory*

**DELIVERY – MONITOR AND CONTROL**

(Portfolio Request Lifecycle Active)

- Update Project Status in Project Inventory*
- Report Weekly Project Time/Effort by Team Members*
- Prepare and deliver regular Status Updates as Required by Senior Leadership*

**OPTIONAL DELIVERY TASK – Approval to Proceed**

*The 'Approval to Proceed' documents clear decision points that keep the project moving forward or stop the project.*

- Complete Approval to Proceed (Go/No-Go Decision point)*
- DC+ Conducted: Project Status Updates due to Scope / Schedule Changes by Project Manager to Domain Council for any major risk and mitigation strategies
- Receive Approval to Proceed
- Post Approval to Proceed in Project Inventory*

**OPTIONAL DELIVERY TASK – Approval to Operate**

*The 'Approval to Operate' documents multiple releases or deliverables that are transitioned to operations at varying times. It allows portions of the project work to be considered complete even if all deliverables are incomplete.*

- Complete Approval to Operate*
- DC+ Conducted: Project Status Updates due to Scope / Schedule Changes by the Project Manager to the Domain Council for any major risk and mitigation strategies
- Receive Approval
- Move Approved Deliverable(s) to Operations
- Post Approval to Operational in Project Inventory*

**CLOSEOUT**

(Portfolio Lifecycle Active)

- Complete Project Closeout Document*
- DCF Conducted: Project Manager and Project Sponsor inform Domain Council of Project Completion
- Closeout Document Approved
- Post Closeout Document to Project Inventory*
- Complete FINAL project status update to designate the project as Operational/Closed*

Additional Information: <https://pmo.gmu.edu>