IT Project Management Framework

BACKGROUND

The following is a checklist of the items and requirements needed to navigate the Project Lifecycle.

Go to https://pmo.gmu.edu for additional information.

PROJECT MANAGEMENT FRAMEWORK

The Project Management (PM) Framework consists of:

- Project Types – help determine and adapt to the needs of different projects
- Project Phases – blocks of activities with their own purpose, deliverables, and required gates
- Project Gates – formal key decision points required to move between phases
- Project Templates – standardized forms that collect and report consistent data about the project

PROJECT TYPES

A method to account for varying approaches to project management, levels of uncertainty, etc.

- Standard – the most common
- Light – less planning and fewer control gates
- Iterative – repetitive cycles required to deliver the final product

PROJECT PHASES

1. **Identification** – capture the business need for the project and the ideal solution
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

PROJECT GATES

- Governance Approval – approval of the business case and the ability to move from Identification to Initiation
- Project Owners Review and Initiation Kick-off– review and approval of the Project Charter and move from Initiation to Planning
- Readiness Review – Review of the deliverables, plan, schedule, and resource needs and move from Planning to Delivery (Execution)
- Acceptance Review – Acceptance of deliverables; move to Closeout if all deliverables are complete
- Approval to Proceed (optional) – Capture key decisions for the project go/no decision points anytime during the project lifecycle
- Approval to Operate (optional) – Approval to release deliverables to production during project lifecycle if necessary (e.g., software development)
- Closeout Review – Final approval and closure of the project; releases project resources

TEMPLATES

The Mason IT PM Framework includes the following lifecycle templates as a means to satisfy the project management deliverables

Template	Phase	Overview
1-Prioritization Criteria Worksheet (PCW)	Identification	Captures the business case: purpose, goals, benefits, and costs
2-Project Request Summary	Identification	Auto-generated report from PCW
3-Charter	Initiation	Captures deliverables, team requirements, assumptions, risks
4-Planning Document	Planning	Identifies specific resources, schedule, work/effort, and refines assumptions, risks, and deliverables
5-Acceptance of Deliverables	Delivery-Execution	Approval documenting that deliverable requirements have been met
6-Approval to Proceed (Optional)	Delivery-Execution	Approval to continue the project on a specific path (go/no go approval)
7-Approval to Operate (Optional)	Delivery-Execution	Approval to transition project deliverable(s) to the operational team(s)
8-Project Closeout Document	Closeout	Evaluation of project success, lessons learned

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: Italicized items are performed by the PPMO.*

ITS Project Inventory: https://epmo.gmu.edu/projectinv

IDENTIFICATION

(Portfolio Lifecycle Aware & Submitted)
- ☐ Complete Prioritization Criteria Worksheet (PCW)
- ☐ Submit PCW for Governance Approval
- ☐ *Post PCW in Project Inventory*
- ☐ *Create Project Inventory Entry*
- ☐ *Request Reviewed by Governance Body*
    - ☐ *ITGG – Strategic or Capital*
    - ☐ *ITS Senior Staff – Maintenance or Mandate*
- ☐ PCW Approved   Date:_____

INITIATION

(Portfolio Lifecycle Approved)
- ☐ Complete Project Charter
    - ☐ Identify Deliverables
    - ☐ Document Assumptions and Risks
    - ☐ Select Resource Needs
- ☐ Complete Project Owners Review
- ☐ Receive Formal Start Work Order
- ☐ Complete Initiation Kick-off
- ☐ Project Charter Approved   Date:_____
- ☐ *Post Project Charter in Project Inventory*

PLANNING

(Portfolio Lifecycle Active)
- ☐ Complete Project Planning materials
    - ☐ Planning Document
    - ☐ Project Schedule
    - ☐ Communications Plan
- ☐ Conduct Readiness Review
- ☐ Planning Docs Approved   Date:_____
- ☐ *Post Planning Documents in Project Inventory*

DELIVERY - EXECUTION

(Portfolio Lifecycle Active)
- ☐ Conduct Execution Kick-off Meeting
- ☐ Work Project Tasks Per Schedule
- ☐ Complete Project Deliverables
- ☐ Complete Acceptance Review (repeat as necessary for all deliverables)

- ☐ All Deliverable(s) Approved   Date:_____
- ☐ *Post Acceptance of Deliverables in Project Inventory*

OPTIONAL/FOR ITERATIVE PROJECTS

An 'Approval to Proceed' documents clear decision points that keep the project moving forward or stops the project. It captures management approval of key decisions and next steps for projects within the Delivery phase.
- ☐ Complete Approval to Proceed (Go/No-Go Decision point
- ☐ Review Approval to Proceed with Sponsor/Approvers
- ☐ Receive Approval to Proceed
- ☐ *Post Approval to Proceed in Project Inventory*

OPTIONAL/FOR ITERATIVE PROJECTS

An '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 not complete.
- ☐ Complete Approval to Operate
- ☐ Review Approval to Proceed with Sponsor/Stakeholders
- ☐ Receive Approval   Date:_____
- ☐ Move Approved Deliverable(s) to Operations
- ☐ *Post Approval to Operate in Project Inventory*

DELIVERY – MONITOR AND CONTROL

(Portfolio Lifecycle Approved)
- ☐ Update Project Status in Project Inventory
- ☐ Report Weekly Project Time/Effort by Team Members
- ☐ Prepare Regular Status Updates as Required by Senior Leadership

CLOSEOUT

(Portfolio Lifecycle Active & Operational)
- ☐ Complete Project Closeout Document
- ☐ Conduct Closeout Review Meeting
- ☐ Closeout Doc Approved   Date:_____
- ☐ *Post Closeout Document to Project Inventory*
- ☐ *Complete FINAL project status update to designate the project as Operational/Closed*

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

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