

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 Classifications – 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 Lifecycle Stage	Initiation	Planning	Execution	Delivery	Monitoring & Control	Closeout
Project Management Deliverable Template	3 Project Charter	4 1. Planning Doc 2. Project Schedule 3. Communication Plan	5 Acceptance of Deliverables	6 Optional	7 1. Approval to Proceed 2. Approval to Operate 3. Project Status & Reporting	8 Closeout Document
Approval (Control Gates)	Project Owner Review Initiation Kick-Off	Readiness Review	Acceptance Review	Approval to Operate		Closeout Review
Primary Responsibility	Project Sponsor and/or Project Manager	Project Manager	Project Manager	Project Manager		Project Manager
Project Types	The Project Type Dictates Document & Control Gate Cycle (Standard, Light, Iterative, or Hybrid)					

PROJECT CLASSIFICATIONS

A method to size a project based on its complexity using *Cost, Duration, Project Team, External Mandate, Internal Mandate, Organizational Risk, and Scope of Impact.*

Determines the required Project Management approach and documentation required.

- **Class 1** – the least complex with a low cost, short project duration, no organizational risk, involves and impacts only one unit, and is not required by an internal or external mandate.
- **Class 2** – a moderately complex project with a medium cost and project duration, involves and impacts just one unit.
- **Class 3** – the most complex project with a high cost, long project duration, involves and impacts multiple schools/units, and fulfills external and/or internal mandate(s)

PROJECT PHASES



1. ***Intake** – captures the business need and the ideal solution and kicks off the Project 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 lifecycle;*

PROJECT GATES

- **Governance Approval** – approval of the business case and the ability to start the project with Initiation
- **Portfolio 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 to Delivery
- **Acceptance Review** – Acceptance of deliverables; moves to Closeout if all deliverables are complete
- **Approval to Proceed (optional)** – Capture key decisions (e.g., go/no-go) anytime during the project lifecycle
- **Approval to Operate (optional)** – Approval to release deliverables to production if necessary (e.g., software)
- **Closeout Review** – Final approval and closure of the project; releases project resources

TEMPLATES

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



Template	Phase	Overview
1A-Business Case	Intake	Capture needs and justifications for a large-scale project or investment
1B-Prioritization Criteria Worksheet (PCW)	Intake	Captures the purpose, goals, benefits, and costs of an internal IT or infrastructure project.
2- Request Summary	Intake	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 requirement 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 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.*

See the Project Dashboard for information on projects <https://its.gmu.edu/projects-dashboard/>

INTAKE

(Portfolio Lifecycle Aware & Submitted)

- Complete Business Case or Prioritization Criteria Worksheet (PCW)
- Submit for Governance Approval
- Post Intake document in Project Inventory*
- Create Project Inventory Entry*
- Request Reviewed by Governance Body*
 - ITGG – Strategic or Capital*
 - ITS Senior Staff – Maintenance or Mandate*
- Form Approved **Date:** _____

INITIATION

(Portfolio Lifecycle Approved)

- Complete Project Charter
 - Identify Deliverables
 - Document Assumptions and Risks
 - Select Resource Needs
- Complete Portfolio 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

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

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)
- Review Approval to Proceed with Sponsor/Approvers
- 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 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 and deliver 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>