

Introduction

This standard defines the project management methodology and guiding principles for IT project management at Radford University. It includes a process for categorizing projects based upon complexity and risk to establish an appropriate level of project oversight and documentation. These standards apply to all information technology projects, whether executed by the Division of Information Technology or other areas within the university, with the exception of research projects or initiatives.

Scope and Purpose

A project is defined as a temporary endeavor undertaken by or on behalf of the university that:

1. provides tangible and unique technology products or services;
2. fulfills a defined business objective to substantially improve business processes to a department or to the university;
3. incorporates significant changes to the technology architecture through new or existing systems.

Successful project management improves project results through a uniform application of project management best practices, techniques and tools. Procedures and documentation align with the Project Management Body of Knowledge (PMBOK), published by the Project Management Institute (PMI), and industry best practices, appropriately tailored for Radford University.

Project Management Methodology

The project management methodology is closely aligned with the lifecycle of a project. The lifecycle is comprised of four phases which are sequential and often overlap. The four phases are the Initiation phase, the Planning phase, the Execution/Control phase, and the Closeout phase. The table below presents each phase along with key activities, milestones, and deliverables required.

Phase	Key Activities	Deliverables
Project Initiation	<ul style="list-style-type: none"> ▪ Develop business case ▪ Identify sponsor/key stakeholders ▪ Identify Internal Oversight or Executive Committee ▪ Develop charter/proposal ▪ Assess complexity/risk ▪ Approvals 	Project Initiation Questionnaire Project Charter Complexity Model Cost Benefit Analysis
Project Planning	<ul style="list-style-type: none"> ▪ Assign project manager ▪ Refine scope 	Project Plan

	<ul style="list-style-type: none"> ▪ Finalize milestones ▪ Develop schedule ▪ Develop budget ▪ Develop change management plan ▪ Develop communications plan ▪ Develop risk management plan ▪ Develop procurement plan ▪ Develop resource plan 	
Project Execution/Control	<ul style="list-style-type: none"> ▪ Execute project plan ▪ Monitor project progress ▪ Conduct status meetings/team meetings ▪ Manage issues/risks 	Issue Logs Status Reports
Project Closeout	<ul style="list-style-type: none"> ▪ User acceptance of final deliverables ▪ Document lessons learned ▪ Contract closeout (if applicable) 	Closeout Report Archive project documents

Project Documentation and Oversight

Required documentation and oversight is defined by the project’s cost and complexity. During the Project Initiation phase, key stakeholders, the Project Sponsor, and team members evaluate the project based on budget, timelines, dependencies, risk, impact of the deliverables, and stability of the proposed new technology. A Project Initiation Questionnaire must be completed to assist the Project Management Office in this evaluation and to determine the overall classification. Once evaluated, the classification and complexity drive the level of required documentation and institutional oversight. The PMO will provide university departments with the appropriate documentation requirements.

A project may be classified as either Major or Non-Major.

Major technology projects:

1. cost, from project initiation to closeout, over \$1M. These costs include all hardware, software, services, maintenance, supplies and materials, and internal staff salaries applicable to the project, or
2. are mission critical to the university, or
3. are set forth by VITA as having “statewide application”.

Non-major technology projects are those technology projects that have an estimated total cost of less than or equal to \$1 million and are neither mission critical to the university nor designated by VITA as having statewide application.

However, certain characteristics elevate complexity for technology projects. These include systems that:

1. interface to the university's Banner Administrative Systems (for data related to Student Administration, Finance, Human Resources, Advancement, Financial Aid, Student Accounts Receivable, etc);
2. authenticate using the university's directory services (i.e. LDAP); or
3. collect, process or store personally identifiable information (sensitive information such as SSN, birth date, donor information).

If the project contains any of the complexity factors listed, or if DoIT will provide server space, administration, application development services, or other support/resources, DoIT is required to review the project proposal.

Approvals

Based upon the classification, the project will require certain approvals. The following oversight approvals generally apply. RU's President has final project management oversight authority and may review or suspend any project.

Project review will be requested via two avenues:

1. Submission of a New Initiative Request during the annual budget review cycle. New projects requiring funding beyond the departmental budget allocations will be submitted as new initiatives during the Budget Evaluation process. A Project Initiation Questionnaire, approved by the department and the division's Vice President, will be submitted along with the new initiative budget request for review. Once the request is evaluated and classified by the PMO, the project request will be submitted to the Budget Office and the President's Cabinet for review and approval.
2. Submission of a Project Initiation Questionnaire where additional funding is not required. Projects that can be funded via a departmental budget may be submitted at any time via the Project Initiation Questionnaire. Requests must be approved by the department and the division's Vice President prior to submission to the PMO. Once the request is evaluated and classified by the PMO, the request will be submitted to the CIO for approval.

Projects approved by the Budget Office, the President's Cabinet, and/or the CIO will be considered approved for planning. The PMO will work with the project initiator to identify documentation and project management activities that will be required. These may include project plans, procurement

approvals, milestone identification, status, issues and management reporting. Details are outlined in the Project Documentation Requirements.

Project Manager Selection and Training

Project managers are selected and assigned to projects by the Vice President for Information Technology & CIO. The training and certification required for a Project Manager is determined by the project's complexity. For medium to high complexity projects, a Project Management Institute (PMI) or Virginia Information Technologies Agency (VITA) certified Project Manager is required. For low complexity projects, a non-certified Project Manager may be assigned. However, it is recommended that a certified Project Manager serve as a consultant on low complexity projects.