



CEO/IT Project Management Methodology

County of Orange
CEO, Information Technology
Program Management Office

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Version History

Version #	Date	Descriptions/Changes
0.1	11/08/07	Initial document draft
0.2	11/28/07	Revised document draft
1.0	12/06/07	Publish document in the Clarity Knowledge Store
1.2	08/06/08	Update Phases and Artifacts
1.3	09/24/09	Update documentation and work flows
1.4	07/9/10	Revised NPS and Security Roles

Related Documents

Document Name	Description	Location
Project Artifact Templates	Document templates	Clarity Knowledge Store
Project Management Guidelines	Risk, Issue, Changes, Financials	Clarity Knowledge Store

Glossary

Term	Definition of Term
PMO	Program Management Office
Clarity	Clarity IT Portfolio Management System
PMI	Project Management Institute
WBS	Work Breakdown Structure
BOS	Board of Supervisors
ROI	Return on Investment
Idea	New Project Request

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Introduction

This document provides an overview of the County Executive Office-Information Technology (CEO/IT) Project Management Methodology. It describes the methods, processes and standards developed for CEO/IT projects. The methodology will be used by CEO-IT to provide a consistent framework for delivering IT projects on time, on budget, and to meet or exceed customer expectations.

The Clarity IT Portfolio Management tool (Clarity) has been selected by CEO/IT to support a single system for a comprehensive and standardized project management framework. The solution provides:

- Best-practice project execution and resource optimization that leads to greater IT efficiency and accountability
- Standardized project templates and artifacts
- Tools for informed decision-making on IT services that lead to better alignment of IT with customer goals and strategic objectives

Purpose

The County has established a Project Management Methodology based on the standards set by the Project Management Institute (PMI) for county agencies to use as guidelines for effective Project Management. CEO/IT will use the County Methodology, coupled with best practices built into Clarity, to establish a consistent framework, standard templates and processes with clear expectations as to how projects will be managed within CEO/IT.

Definition of Project Management

Project management is the application of knowledge, skills, tools, and techniques to undertake or plan activities in order to meet or exceed stakeholder needs and expectations from a project. Meeting or exceeding stakeholder needs and expectations involves balancing competing demands among:

- Scope, time, cost, and quality
- Stakeholders with differing needs and expectations
- Identified requirements (needs) and unidentified requirements (expectations)

Project management is integrative in nature — an action, or failure to take action, in one area will usually affect other areas. These interactions may be quite obvious, or more subtle and uncertain. For example, a scope change will usually impact the project's cost and/or schedule, but may or may not impact product quality.

Successful project management requires aggressively managing these interactions, and understanding that there are often tradeoffs required among project objectives. It may be that meeting objectives in one area can only be done at the expense of objectives in another area.

1 PMO Governance

The Program Management Office (PMO) is established for the purpose of providing guidance and ensuring success of CEO-IT and County IT initiatives. The PMO is responsible for managing the CEO/IT project portfolio, prioritizing projects, aligning projects with business goals, providing formal project oversight and ensuring the successful project completion.

The PMO will be engaged for all CEO-IT projects over 500 hours or that exceed a budgeted amount of \$50,000.

1.1 PMO Policy

- Provides structure and leadership for managing IT projects and programs
- Manage the 038, 289 & County IT project portfolios; monitoring project demand, scoring, prioritization, resources and budget to ensure project success
- Provides guidance and coaching to Project Managers to ensure effective project management across CEO/IT and County Agencies
- Maintains a repository of project documents, lessons learned and best practices to facilitate future project planning

1.2 PMO Roles

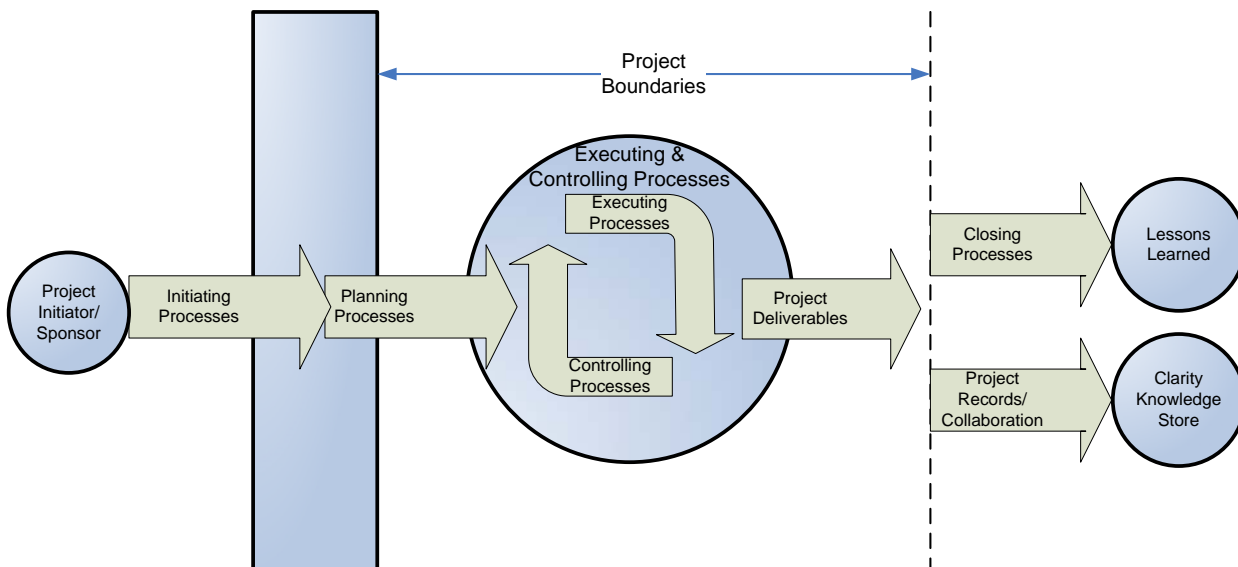
Role	Responsibility
CIO Executive Management	<ul style="list-style-type: none">▪ Maintain governance and oversight of all CEO/IT 038 and 289 project initiatives▪ Ensure projects align with business objectives▪ Review and approve new Ideas/Concepts▪ Resolve conflicting resource priorities and approve staff augmentation as required▪ Analyzes IT portfolio to determine priorities & greatest business value▪ Authorizes and enforces a standardized project management methodology
PMO Director	<ul style="list-style-type: none">▪ Maintains knowledge of project management best practices and lessons learned▪ Implement project management methodology, standards & tools▪ Leads the Project Management Review Board in review, prioritization and selection of yearly IT projects over \$150,000▪ Manages the 038 Project Portfolio
Program Managers	<ul style="list-style-type: none">▪ Establishes vision and goals for Countywide programs and provides on-going management of programs▪ Partner with Project Managers to ensure delivery of quality products on budget and on schedule▪ Create new projects and review/approve feasibility studies & project scoring▪ May serve as Project Manager on large or enterprise projects▪ Helps mitigate escalated project risks & issues▪ Oversee project budget, expenditures, change requests and metrics

Role	Responsibility
Project Managers	<ul style="list-style-type: none"> ▪ Create Feasibility Study (Business Analyst if available) ▪ Establish a business case from a feasibility study ▪ Develop project charter ▪ Identify required resources by role and confirm availability with Resource Managers ▪ Work with team to develop project planning documents as outlined in the project artifact guideline for project type & size ▪ Execute project plan and acquire approval on project deliverables ▪ Update bi-weekly status report ▪ Risk/Issue/Change Request management ▪ Document Lessons Learned
Business Analyst (Project Managers or CEO-IT leads may serve as this role when required)	<ul style="list-style-type: none"> ▪ Prepare project feasibility studies ▪ Develop project business case ▪ Interface with customer to document requirements ▪ Prepares Customer Project Estimates
Resource Managers	<ul style="list-style-type: none"> ▪ Manage resource availability ▪ Perform Demand/Capacity planning ▪ Replace resource roles with named resources ▪ Communicate resource availability and constraints with project managers ▪ Allocate resources to non-project work (Bucket Projects) to show full utilization

2 Project Life Cycle

The Project Life Cycle is a set of phases/activities/tasks that make up the approach of the project. Depending on the nature of your project, the phases may be dependent on each other or executed in parallel. Each phase completes one or more deliverables, a tangible and verifiable product, or service. All of the phase deliverables make up the final product being delivered by the project.

Below is a high-level diagram of the overall CEO/IT Life Cycle. A more detailed project life cycle workflow diagram can be reviewed in Section 7 Appendix C.

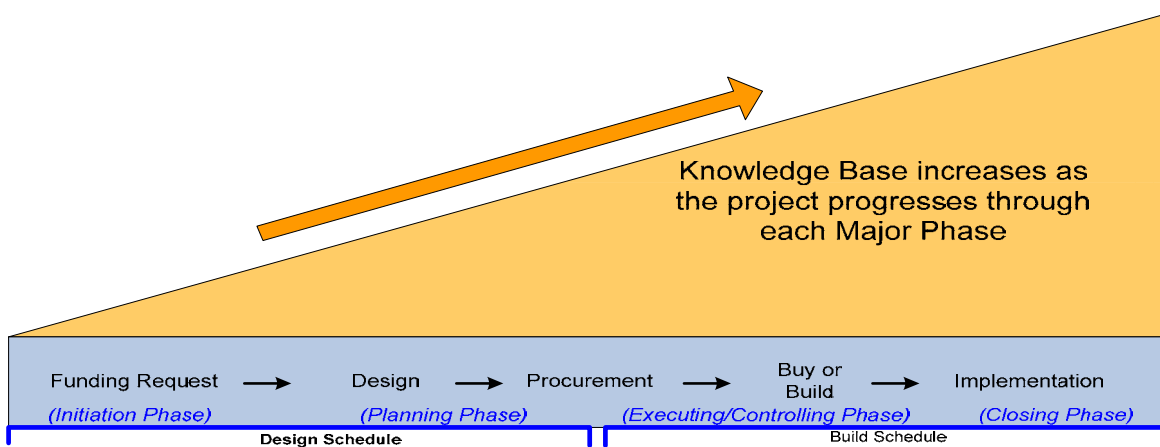


3 Project Standardization Framework

CEO/IT has defined project standards, templates, artifacts and guidelines to assist project managers with creating appropriate project documentation and managing projects effectively. By using the project templates and artifacts within the Clarity Knowledge Store, Project Managers can save time, improve the management of their projects, capture the right amount of detail required to support their project and ensure that CEO-IT is managing projects consistently with better results.

3.1 Design and Build Schedules

In order to assist Project Managers with creating more accurate project schedules, the PMO has established a guideline to generate two major schedules; with consideration of both a project original “Design” schedule and a “re-baselined” implementation or “Build” schedule.



3.1.1 Original “Design” Schedule

During Project Initiation, a Project Manager develops a high-level schedule. This schedule is based on high-level project requirements known at that time. Project Managers will be responsible for meeting only the Initiation and Planning Phase deliverables within this schedule, which includes development of detailed project requirements and the system design.

- Schedule based on the WBS template in Clarity and information regarding high-level resource requirements
- At this time, Project Managers are responsible for meeting the Initiation and Planning Phase dates as reflected in their “Design” schedule
- Design schedule is the original baseline schedule in Clarity.

3.1.2 Implementation “Build” Schedule

As more knowledge is gained during the Planning Phase and the Execution Phase begins, the project can develop a revised “Build” Schedule to provide more accurate dates. This schedule will reflect modifications based on detailed requirements generated during the Planning Phase:

- Procurement is complete
- External dependencies are solidified

- The team solidifies specific activities that must be performed and effort required to produce the project deliverables

For projects that are included on the Quarterly IT Project Status report, both schedules will be reported. The “Design” schedule will represent the dates for the initiation and planning activities. The “Build” schedule will reflect dates for the executing activities. The preliminary “Build” schedule can be revised at the start of the executing/controlling phase to reflect any changes to the project schedule as more information was learned. The Project Manager will be responsible for meeting these two schedules. If the Build schedule is modified at this time, create an additional baseline in Clarity.

Design/Build Schedule Example

Project Schedule: Jan 09 – Dec 09

Design Schedule: Jan – Mar 2009

Build Schedule: April – December 09 In April this schedule could be revised based on new information as you move into your project execution phase. Project end-date could be rebaselined without penalty.

3.1.3 Additional Re-Baseline Criterion

There are times when a project schedule should be rebaselined. Based on the best practices developed by the Project Management Institute, the Office of the CIO has adopted the following criterion to re-baseline an Information Technology project:

- The technology being implemented will be dramatically enhanced in the near future.
- Synchronizing with another project to leverage or advance both.
- New technology or alternatives become available since the initial project was conceived; causing consideration of a new direction that would be more advantageous.
- No or maybe one response is received during a Request For Proposal. This may indicate that project requirements and specifications need to be revised.
- Approved change in scope, which will impact schedule to meet new requirements.
- Project dependency with a partnering entity that is outside of the Agency’s control

3.2 Project Type and Size

To define the Project Portfolio and work effort, projects are categorized by project type. Depending upon the project type and size, the specific activities and deliverables that are required during the project will vary. The following project types and sizes have been identified:

Project Type	Project Size
<ul style="list-style-type: none"> ▪ Information Decision Support ▪ Security ▪ Infrastructure ▪ Application Development ▪ Packaged Software Implementation ▪ Assessment / Study ▪ Process Re-Engineering ▪ Facilities ▪ Telephone Services 	<ul style="list-style-type: none"> ▪ Small: 100-500 hours ▪ Medium: 500-1000 hours ▪ Large: >1,000 hours

3.3 Project Schedule Templates

Project Templates, based on CEO/IT project types, have been defined in Clarity to provide a standard Work Breakdown Structure (WBS), assigned resource roles, estimated time to complete the project, as well as artifacts

required. These templates encompass all project phases and are an excellent guideline for improving project scheduling.

The standard project templates are managed by the PMO and will evolve and improve as the CEO/IT organization matures. Currently, Project Templates have been created in Clarity by project type with tasks that support large size projects. For projects that are categorized as small or medium, Project Managers can remove tasks that are not required. The following is a list of project templates available in Clarity.

- Infrastructure
- Application Development
- Software Implementation
- Assessment / Study
- Process Re-engineering
- Facilities
- Telephone Services

3.4 Project Artifacts

Project Artifacts represent the deliverables required during the various phases of a project. The PMO has established a guideline of artifacts required based on Project Type and Size. This guideline is available with the associated document templates in the Clarity Knowledge Store. (Refer to Section 5 Appendix A-Project Artifacts for a complete list.)

3.5 Clarity Knowledge Store

A central repository is available within Clarity known as the Knowledge Store. This repository will host PMO Policies, Guidelines, Document Templates and Best Practices to assist CEO/IT with preparing and managing IT projects and resources.

This repository is managed by the PMO and will be updated on a regular basis to maintain an effective project reference library. (Refer to Section 5 Appendix A and B-Project Artifacts and Guidelines for a complete list.)

3.6 Approvals

The CEO-IT Program Management Office (PMO) has visibility and approval authority of all projects categorized as “medium” or “large”. These projects are over 500 hours or have a budgeted amount of \$50,000 or more. CEO-IT Managers will provide over site and approval of all other projects.

3.6.1 Clarity Security Roles

Clarity has predefined Security Roles to apply system rights to support (future) automated workflow processes that align with the project management methodology for reviewing and approving projects as they move through the Project Life Cycle. The Security Roles are defined in the table below.

Clarity Security Role	Access/Rights	CEO-IT Resource Role
CEO-IT All Staff	<ul style="list-style-type: none">Base rights for all users.Create Ideas (project request)View all projects, resources and knowledge store	<ul style="list-style-type: none">All CEO-IT staff
Review Committee	<ul style="list-style-type: none">Review and Approve Ideas	<ul style="list-style-type: none">CIOCEO-IT Executive ManagementProgram Management Office
PMO Team	<ul style="list-style-type: none">Convert Ideas to ProjectsCreate new ProjectsKnowledge Store AdministrationUpdate project approvals sub-pageApprove Budget PlanApprove/Update Baseline schedules	<ul style="list-style-type: none">CIO Program Management OfficeCEO-IT Executive ManagementCEO-IT Division Managers
Project Manager	<ul style="list-style-type: none">Create new ProjectsEdit Project PropertiesSubmit Financial Plans for ApprovalAssign Resource Roles	<ul style="list-style-type: none">CEO-IT Project ManagersCIO Program Management Office
Resource Manager	<ul style="list-style-type: none">Hard book ResourcesEdit Resource propertiesView Management for projects	<ul style="list-style-type: none">CEO-IT Resource Managers

4 Phases within the Project Life Cycle

The CEO-IT Project Management life cycle consists of six phases defined within Clarity as described below:

Phases	Description
Idea/Concept	<ul style="list-style-type: none"> ▪ New project request that contains high-level business case and project justification information
Feasibility Study (or Customer Estimate)	<ul style="list-style-type: none"> ▪ Approved Idea is converted to an unapproved CEO/IT project ▪ Detailed business case prepared (or Customer Estimate) ▪ High-level WBS and Resource Roles established ▪ Information System Request (ISR) budget process conducted
Initiating	<ul style="list-style-type: none"> ▪ Project is approved ▪ Cost Plan is converted to an approved budget ▪ Charter is developed and approved by Sponsor
Planning	<ul style="list-style-type: none"> ▪ Detailed Scope ▪ Procurement Method is defined (buy vs. build) ▪ Resources are identified ▪ Work Breakdown Structure (WBS) is created with team ▪ Project Planning documents created
Executing/Controlling	<ul style="list-style-type: none"> ▪ Re-baseline to create "Implementation/Build" schedule, if required ▪ Execute plan and complete project deliverables ▪ Deliverable approval and sign-off ▪ Risk, Issue and Change Management ▪ Bi-Weekly status reporting and Communicating ▪ Budget/Schedule Monitoring
Closing	<ul style="list-style-type: none"> ▪ Sign-off on Project Acceptance by Sponsor ▪ Complete Lessons Learned with Team ▪ Project Manager Customer and PMO Appraisals ▪ Close Project in Clarity & ensure all project documentation is stored in the project collaboration folder for future reference

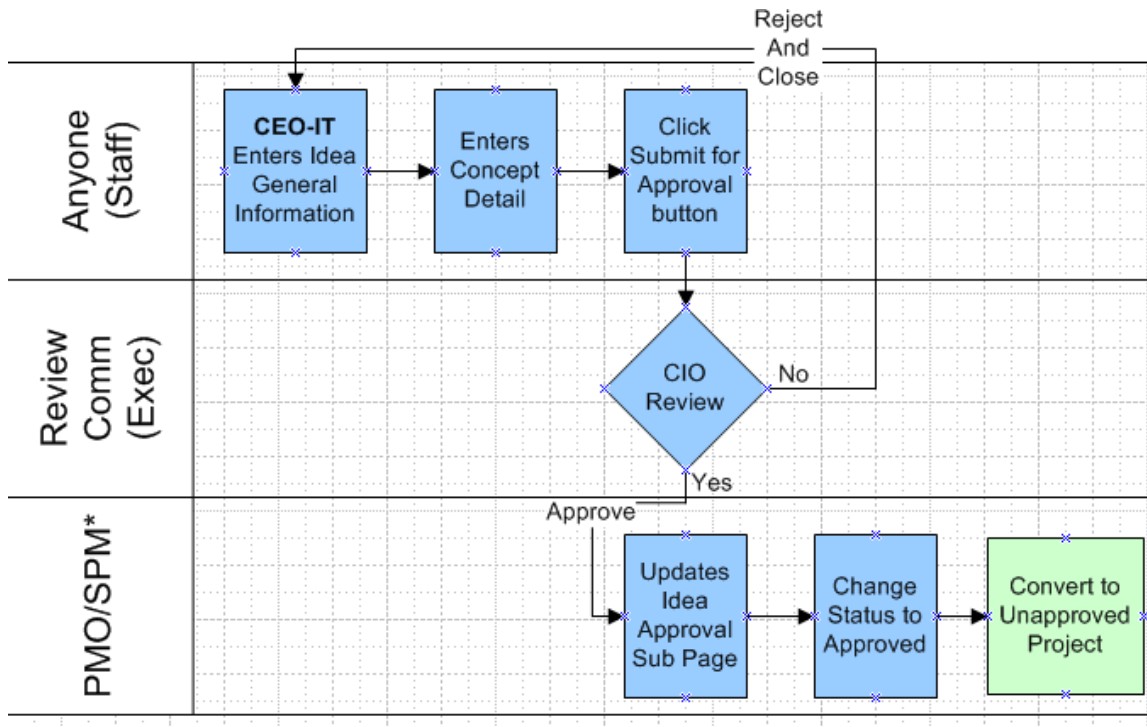
4.1 Idea / Concept

Within Clarity, the project life cycle begins with an Idea (project request) to capture high-level conceptual information (Concept Paper) for a potential solution to a business problem. This initial step provides key information for upper management to determine if the Idea should be approved. Within Clarity, the following fields would be completed:

Idea Data Fields	Definition
Idea Name	A descriptive title for the potential project
ID	Auto-generated Number (ID07-xxxxxx)
Executive Summary	High-Level description of the proposed solution
Creator / Created Date	Auto-generated with Clarity User ID
Requesting Agency	CEO-IT or other requesting Agency
Requestor, Phone Number and Email	Provide Name, Phone number & email of requestor

Idea Data Fields	Definition
Primary Business Goal	Drop Down – Select one of the following: <ul style="list-style-type: none"> ▪ Deliver Quality Services ▪ Create and communicate a brand image of the County of Orange ▪ Engage the community to build collaborative approaches to solve regional issues ▪ Effectively manage and enhance all resources ▪ Hold Individuals accountable through defined business measures ▪ Use Technology to transform service delivery ▪ Create a more accessible and transparent government ▪ Anticipate future clientele and customer needs ▪ Facilitate OC competitiveness globally and in the future
Business Background	Describe the business need and objective for undertaking the project
Benefits/Payback	Quantitative and/or Qualitative <ul style="list-style-type: none"> ▪ Include the high level project costs ▪ Describe quantitative (dollar savings) and qualitative (improved customer satisfaction) benefits ▪ Payback estimate. A more detailed ROI will be covered during the feasibility
Key Stakeholders	Describe key project stakeholders
Project Type	Drop Down – Select one of the following: <ul style="list-style-type: none"> ▪ Information Decision Support ▪ Security ▪ Infrastructure ▪ Application Development ▪ Packaged Software Implementation ▪ Assessment / Study ▪ Process Re-Engineering ▪ Facilities ▪ Telephone Services
Primary Justification	Drop Down - Identify one of the following attributes to best reflect the justification for the project <ul style="list-style-type: none"> ▪ Mandate ▪ Obsolescence ▪ Maintenance and Operations ▪ Business Process Improvement/Automation ▪ Business Strategic Priority ▪ Other
Agencies Affected	Drop down – Select one of the following: <ul style="list-style-type: none"> ▪ 1 Agency ▪ Multiple Agencies ▪ County-Wide ▪ Outside County
High-Level Risk Statement	Describe overall project risk based on uncertainties that could cause an impact to the project schedule, cost or quality. Risks can be related to unclear project objectives, new technology, resource constraints, etc. Example: Project is high risk due to new, complex technology where staff has little experience.
Related Projects/Systems	List related projects and systems
Approval By / Date	Submit for approval. Approved by and date is captured within Clarity.

Idea/Concept Workflow



* Solutions Project Management

Exit Criteria: Upon approval by Senior Management, the Idea is converted to an unapproved project to begin the more detailed Feasibility Study.

4.2 Business Case or Customer Project Estimate

The Business Case is a key document in the project approval process. It defines the reasons, both tangible and intangible, that the County should choose to proceed with this project over other projects. It also defines the project scope, high-level schedule and estimated costs. The information provided will be used to determine which project(s) are authorized to proceed.

The Business Case will be developed within Clarity. It includes the Feasibility Study, Financial Planning and Project Scoring. A Feasibility Study will not be needed for a customer project, only a Project Estimate which is discussed in a Section 4.2.6.

4.2.1 Feasibility Study

A feasibility study has several key components that will provide significant information to fully develop the project Concept Paper into a Business Case. Within Clarity, the following fields will be completed:

Feasibility Data Fields	Definition
*From Idea	The information entered into these fields are carried over from the Idea/Concept object to the Feasibility Study page in the Project object
<i>Executive Summary*</i>	High-level description of the proposed solution, which was presented in the idea
Business Objectives	Outline the outcomes the project will accomplish in clear and measureable terms within a specified time frame. Objectives should be formulated broadly enough so that meaningful alternatives are not ruled out and narrowly enough so that only relevant alternatives are considered.
<i>Business Background*</i>	Describe the history and current state of affairs giving rise to or relating to the general business problem or opportunity that is the subject of the business case
Success Criteria	Key outcomes that will be necessary for the project to be a success
<i>Benefit/Payback*</i>	Include the high level project costs. Describe quantitative and qualitative benefits (e.g., improved customer satisfaction.) Estimate payback.
Business Risks	Identify potential risks within the project. Consider financial, customer and market, schedule, scope, resource, vendor, sw compatibility, and risk of change in technical & organizational environment
Major Features	High level requirements for the project. Primarily identified within Application Development and Software implementation projects.
Assumption	Factors considered real or true i.e. resource availability, consistency of support from another area, etc.
Project Dependencies	List related projects and systems
<i>Requestor*</i>	The person that submitted the project request
Business Case Submit Date	Enter date of completion

4.2.2 Financial Plan

During the feasibility, a financial plan is established in Clarity to capture the project costs, benefits and ROI. Upon project approval by the PMO or the Division manager, the Financial Plan will be promoted to an approved Budget Plan.

Cost and Benefit Plan

Within the Clarity Knowledge Store, project managers can refer to the Financial Planning Guideline folder to utilize the Budget/Financial Planning Guideline and Worksheet to assist with calculating project financial data.

The Clarity Cost Plan contains the following predefined categories.

- External/Internal Labor
- Hardware
- Software
- Maintenance
- Ongoing Operations

The Clarity Benefit Plan is used to identify quantitative benefits. Qualitative benefits are captured within the Feasibility data fields.

4.2.3 Project Scoring

In order to provide a critical set of perspectives by which to understand, evaluate and manage the IT Project Portfolio, a project scoring mechanism has been established within Clarity. This will help the PMO select projects that have the most business value to the organization and prioritize them accordingly. The project score is weighted among several categories and normalized to 100%. The following table describes the overall score.

Category	Scoring Points	% Weight
Business Alignment	Yes/No – 0 or 13 points	13%
Risk Assessment	6 categories (Low/Med/High) 0-15 points	15%
Mandated	Yes/No – 0 or 18 points	18%
Return on Investment (ROI)	3 Options – 0-3-10 points	10%
Payback Period	3 Options – 0-10-15 points	15%
Supports Critical Application or Infrastructure	3 Options – 0-8-13 points	13%
Direct Agency Benefit	4 Options – 0-3-8-10 points	10%
Architectural Fit	3 Options – 0-3-5 points	6%

Business Alignment Scoring

The Business Alignment score provides an understanding of how the project aligns with the overall business plan of the Department and County. Multiple business goals can be identified within this scoring section. The project will obtain the full weighted score by meeting at least one of these goals. The following business goals have been identified for Orange County and represents 15% of the overall project score:

- Deliver quality service
- Create and communicate a brand image of the County of Orange
- Engage the community to build collaborative approaches to solve regional issues
- Effectively manage and enhance all resources
- Hold individuals accountable through defined business measures
- Use technology to transform service delivery
- Create a more accessible and transparent Government
- Anticipate future clientele and customer needs
- Facilitate OC competitiveness globally and in the future

Project Risk Assessment Scoring

The Project Risk Assessment provides an opportunity to measure the potential risk of a project by selecting low, medium or high on 6 categories. The score rates each category and formulates an overall weighted score for the Project Risk category. The following table defines the risk categories and represents 13% of the overall project score:

Risk Category	Description
Objectives	Low = requirements, objectives, scope, benefits are reasonable, clearly defined, measurable, and verifiable High = not reasonable, clearly defined, measurable or verifiable
Interdependencies	Low = not dependent on other projects High = dependencies exist
Technical	Low = technology is proven, no new internal or external expertise is needed; High = technology unproven, requires external expertise
Organizational Culture	Low = requires little change to organizational culture, business processes, procedures, or policies High = requires major changes
Implementation	Low = minor uncertainties in implementation effort and user acceptance High = major uncertainties

Risk Category	Description
Supportability	Low = easy to support in the future; minor updating likely High = major updating likely making support difficult

Mandate

Projects can be driven by a County, State or Federal Mandate which can raise the importance of completing the project deliverables within a set timeframe that is driven by a legal or compliance initiative. This category has the following selection and represents 18% of the overall project score:

- Mandated?
 - Yes (18 points)
 - No (0 points)
- Mandated (Type of)
 - Not Mandated
 - County
 - State
 - Federal

Return On Investment (ROI)

ROI is a key financial metric of the value of business investments and expenditures. It is a net ratio of net benefits over costs expressed as a percentage. A higher percentage score represents a higher ROI.

- <200% (10 points)
- 1-199% (3 points)
- Zero or Negative ROI (0 points)

Payback Period Scoring

The Payback Period is defined as the length of time required to recover an initial investment (project) through cash flows generated by the investment. The Payback Period lets you see the level of profitability of an investment in relation to time. The shorter the time period the better the investment opportunity and reflects the weighted score for this category. A Payback calculation guideline is provided within the Budget and Financial Planning Guideline stored within the Clarity Knowledge Store. The Project Score for Payback Period is based on the drop down selection and represents 15% of the overall project score:

- Payback within year one (15 points)
- Payback within 1st and 2nd years (10 points)
- Payback after 2nd year or no payback (0 points)

Supports a Critical Application or Infrastructure

Projects that support a critical application or infrastructure have added value and can be scored by the type of change that the project will support. This category has a drop down selection of the following and represents 13% of the overall project score:

- Does not support a critical application/infrastructure (0 points)
- Optional Upgrade or enhancements (8 points)
- Required Upgrade –Obsolescence (13 points)

Direct Agency Benefit

Projects can have direct agency benefits to 1 or more agencies within the County. This category allows the project to be scored based on the number of agencies it will impact with a direct, quantifiable benefit. This information is gathered within the Clarity Benefit Plan and Feasibility Study. This category has a drop down selection of the following and represents 10% of the overall project score:

- Benefits are intangible or non-quantifiable (0 points)
- 1 agency receives a direct, quantifiable benefit (5 points)
- 2-5 agencies receive a direct, quantifiable benefit (8 points)
- More than 5 agencies receive a direct, quantifiable benefit (10 points)

Architectural Fit

It is beneficial for Projects to be aligned with the architectural fit of the IT infrastructure for the County. This will allow for successful growth and increased supportability of the proposed solution. This category has a drop down selection of the following and represents 5% of the overall project score:

- Existing architecture will not support this result (0 points)
- Existing architecture supports this result, though it is not in line with the architectural direction (5 points)
- Existing architecture supports this project and it is in line with the architectural direction (10 points)

4.2.4 Submit Business Case

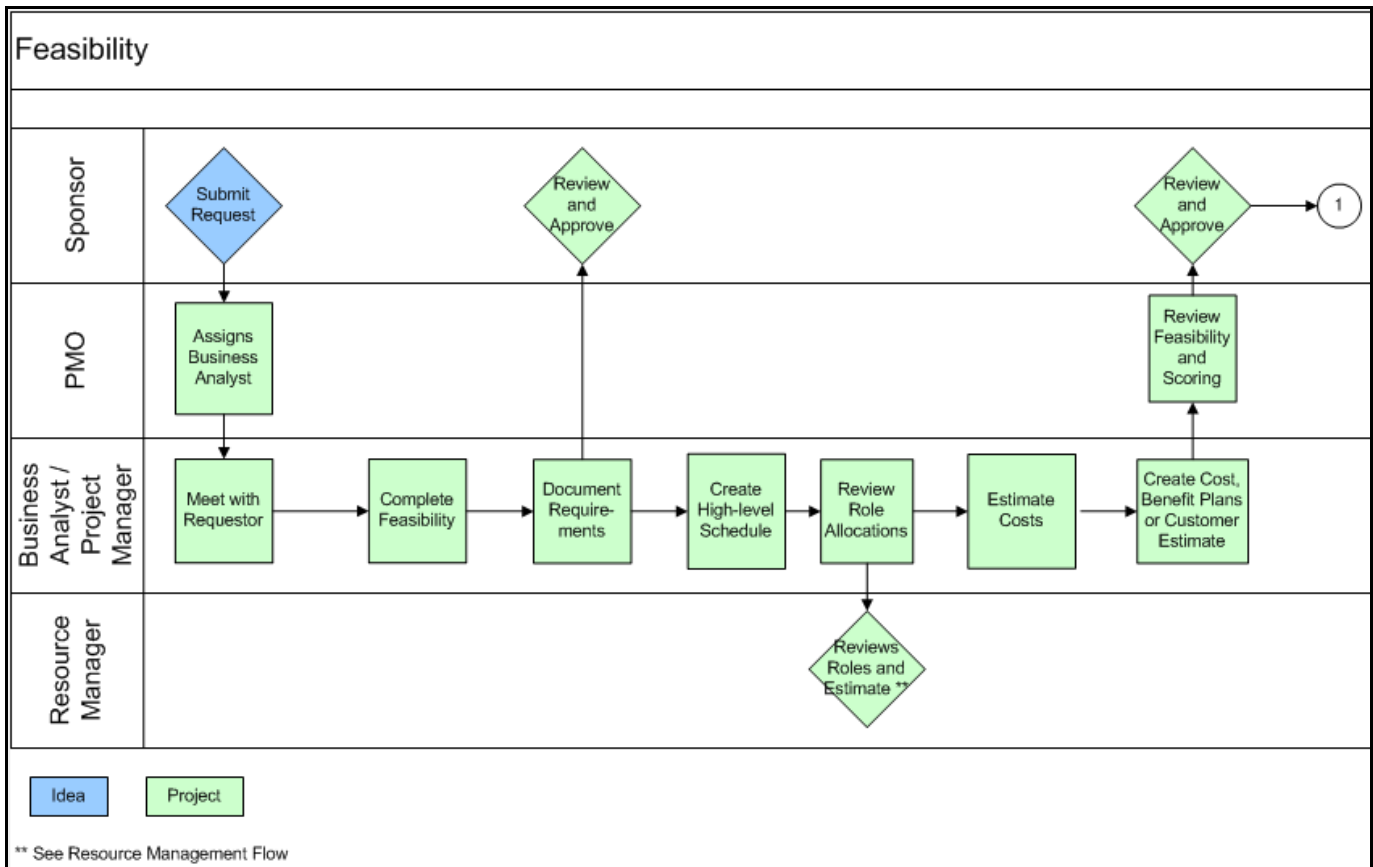
Upon completion of the feasibility study, the project manager (or business analyst) enters the date on the “submit business case” date field and coordinates a review with the PMO and/or the Division Manager. The Business Case is reviewed within Clarity. It is not a printable document at this time.

4.2.5 Information System Request (ISR) Funding Process

Within the CEO/IT organization, the Business Case is used to prepare the annual Information System Request (ISR) within the County Budget Cycle to approve funding. Upon funding approval by the County Budget Office, the Financial Cost Plan can be approved to a Budget Plan within Clarity.

4.2.6 Customer Project Estimate

Upon an Agency/Department request for project support from CEO-IT, a Customer Estimate must be provided and approved by the customer prior to work beginning. A Business Analyst will be assigned to document customer project requirements and prepare a project cost estimate, working with CEO-IT resources to gather requirements and cost information. (See CEO-IT Total Cost of Ownership template in Clarity)

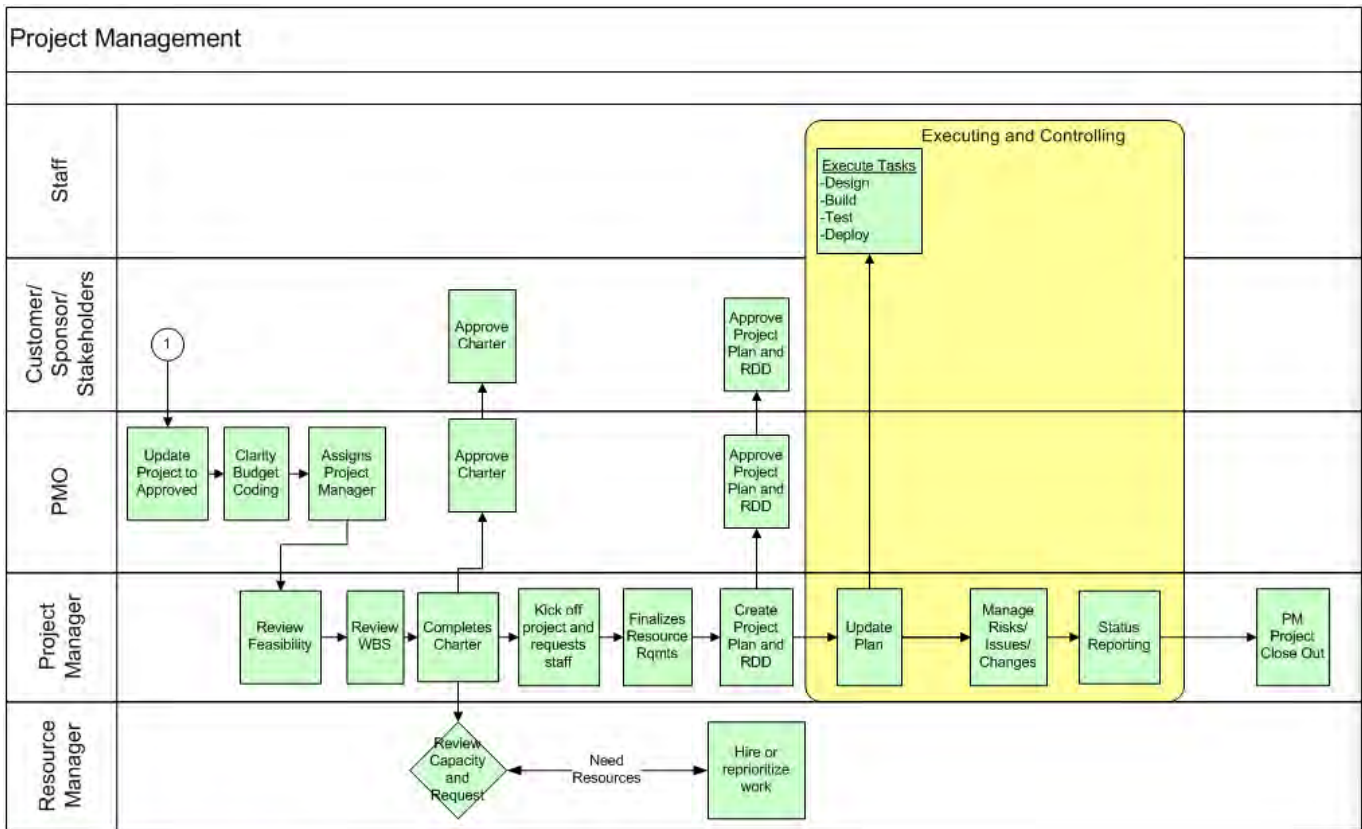


Exit Criteria: Business case is approved or denied by “PMO Team”

4.3 Initiating Phase

Upon approval of the feasibility study by the PMO, the project is promoted to an approved project and the Cost Plan is converted to an approved budget within Clarity.

The Project Manager is assigned and begins to review and validate the project information gathered during the Feasibility Study, develop the Charter and begin discussing resource requirements with Resource Managers. The high-level schedule created during the Feasibility Study can be revised as additional information is gathered during this phase and baselined as the “Design” schedule prior to proceeding to the next phase.



Project (green box) Ongoing throughout project lifecycle (yellow box)

4.3.1 Project General Properties within Clarity

General project attributes have been identified to assist with identifying key information across all types of projects. The following table lists these attributes for the Project General Properties page within Clarity:

Project General Data Field	Description
Project Name	Name of project which is referenced by the Portfolio Status Dashboard and Quarterly Report
Project ID	Auto-generated Number (PR07-xxxxxx)
Description	Brief description of the project
Project Manager	Person responsible for managing the project or conducting the feasibility study
Program Manager	Person responsible for overseeing the project
Phase	Identify the current phase within the project life cycle
Start Date	Start date of project
Finish Date	Finish date of project. This date will be adjusted as Project "Task" finish dates are modified.

Project General Data Field	Description
Primary Business Goal	Select one of the following from a drop down box: <ul style="list-style-type: none"> ▪ Deliver quality service ▪ Create and communicate a brand image of the County of Orange ▪ Engage the community to build collaborative approaches to solve regional issues ▪ Effectively manage and enhance all resources ▪ ▪ Hold individuals accountable through defined business measures ▪ Use technology to transform service delivery ▪ Create a more accessible and transparent Government ▪ Anticipate future clientele and customer needs ▪ Facilitate OC competitiveness globally and in the future
Resource Strategy	Select one of the following from a drop down box: <ul style="list-style-type: none"> ▪ Professional Services ▪ Internal ▪ Professional Services & Internal
Owning Agency	Select County Agency from look up table
Scheduler Format	Defaulted to Microsoft Project
Active	Checked as Active
Project Type	Select one of the following from a drop down box: <ul style="list-style-type: none"> ▪ Information Decision Support ▪ Security ▪ Infrastructure ▪ Application Development ▪ Packaged Software Implementation ▪ Assessment / Study ▪ Process Re-Engineering ▪ Facilities ▪ Telephone Services
Financial Identifiers - This section identifies various funding codes that are needed to manage the project budget and labor activity	
Fund	Funding Source code. i.e., 100 for General Fund and 289 for Internal Service Fund
Agency	Funding Agency code. i.e., 038 for Data Development and 289 for Data Systems
Org	County Code that represents either a project fund or cost pool
County Labor Code	County code created for an approved project to track county labor activity directly related to the project
Elvis Account Code	Billing Account Code that is used within the Elvis Work Request system to associate it to the Project Fund-Agency-Org code
Work Request Number	Elvis Work Request number that is created for a project to approve and track ACS contract labor activity
ROI - Measures effectiveness of the investment by calculating the number of times the net benefits (benefit minus costs) recover the original investment. This functionality is built into Clarity and the ROI is calculated once a Benefit Plan is linked to a Cost Plan.	
Planned Cost	Total from Cost Plan
Planned Benefit	Total from linked Benefit Plan
Planned ROI	Calculated Formula: <i>(Total Project Cost – Total Project Benefit/Total Project Cost) X 100</i>
Organizational Breakdown Structure Section - This structure will be defined in more detail as it relates to the CEO/IT departmental structure in a later phase.	
Department	All departments are rolled up into one category. <ul style="list-style-type: none"> ▪ Look up and select Orange County

Exit Criteria from Initiation Phase: Charter is approved by PMO or Manager depending on project size/type.

4.4 Planning Phase

Project Manager begins to work with the Resource Manager to build project team by replacing resource roles and building the Team (Staff plan within Clarity). The team will assist the Project Manager to develop the Work Breakdown Structure (WBS) and update tasks from the estimated time for completion to actual time to complete.

The Business Partner is also engaged to refine the project scope and business requirements, which will be referenced as the Project Manager begins developing the various project artifacts as outlined in the CEO/IT PMO-Project Artifact Guideline. These project document templates can be retrieved from the Clarity Knowledge Store and should be stored within the project's collaboration folder. (Section 5 Appendix A – Project Artifacts Required)

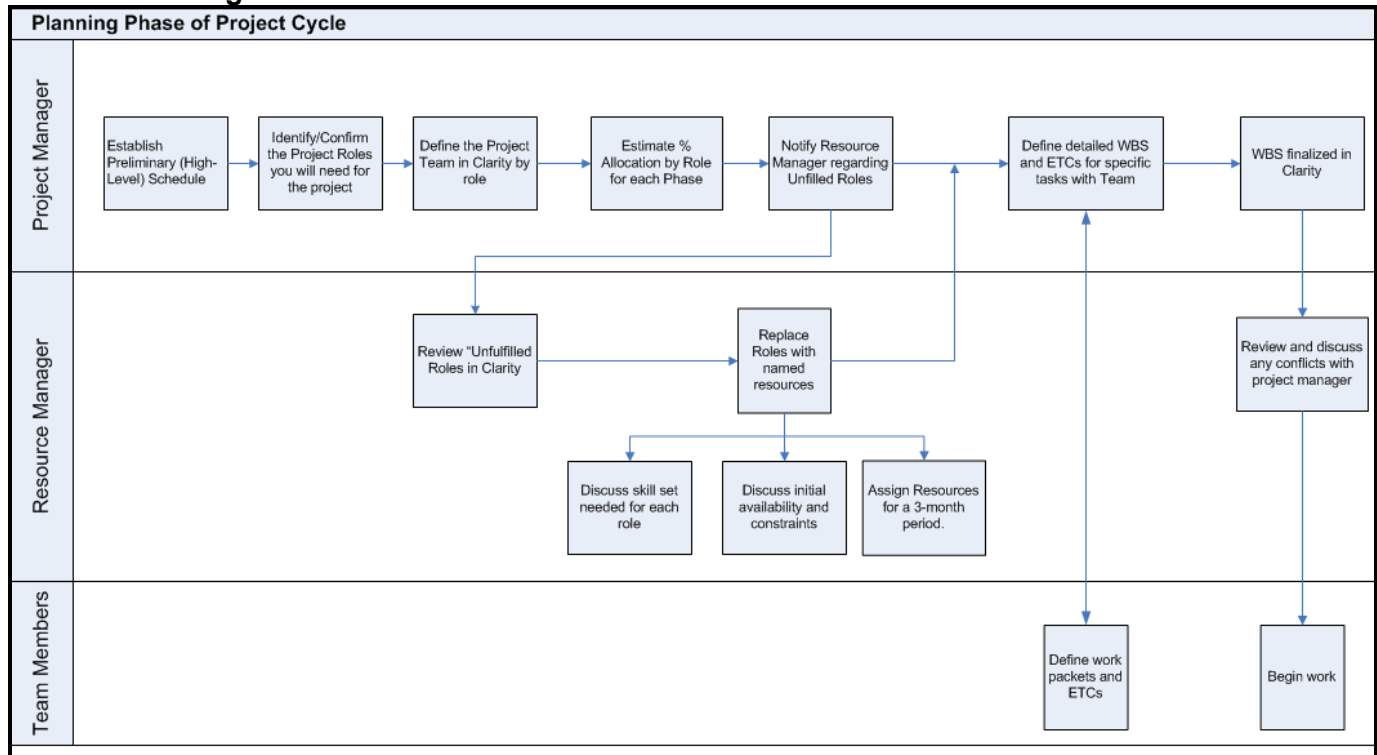
4.4.1 Resource Management

The objective of Resource Management is to acquire, direct and coordinate resources throughout the life cycle of a project. This includes the processes to make the most effective use of all of the people involved in the project effort (i.e., project stakeholders, sponsors, customers, partners, individual contributors, management).

The Project Schedule (Clarity WBS) identifies the Resource Roles needed for successful completion of a project. The Project Manager needs to evaluate the Resource Roles and work with Resource Managers to replace Resource Roles to Named Resources. This will often include communicating with other Project Managers where there are conflicts with the need for a specific Resource.

Clarity provides a central repository of all CEO/IT projects and resources to support capacity planning for resources and related projects. Resource Managers will utilize the Resource Planning module within Clarity to monitor unfilled resource roles, resource workloads and weekly details of their resource allocation to projects to assist with coordinating resources throughout the project. CEO/IT Division Managers will establish the necessary meetings/communications to facilitate resolution of any constrained resources. Any unresolved resource issues should be escalated to the PMO.

Resource Management Workflow



4.4.2 Resource Primary Roles

In order to conduct Resource Capacity Planning within Clarity, Resource Roles have been established to categorize CEO/IT resources based on a primary role. Resource Managers are responsible for ensuring that their staff is assigned a primary role within Clarity. Resource Capacity Planning will compare the demand of resources assigned to projects as well as unfilled roles against the CEO/IT Capacity, which represents the number of resources that fill each primary role. The Primary Roles identified within Clarity are as follows:

COE	Primary Role	Description
Strategic/ Consulting	Enterprise Architect	Operates across multiple disciplines (computing "silos" – like: Application, Network, Security, Platform) to drive common approaches throughout the enterprise (enterprise=County + all computing disciplines). Previously known as - Infrastructure Architecture (i.e., Tony Lucich) (ACS Role-IT Enterprise Architects/Special Services)
Strategic/ Consulting	Information Security Officer	
PMO	Program Manager	Provides structure and leadership for managing IT projects and programs
SPM	Project Manager	Manages projects
SPM	Business Analyst	i.e., System Analyst Communicate with customers, propose automated solutions, deep understanding of functionality, identify use case requirements, coordinate with PM, prepare business processes, and coordinate testing.
Process/QA	Process Engineer	Analyzes, plans and implements process improvement (such as Six Sigma initiative) needs. Produces new process improvement techniques and services. Develops metrics that provide data for process management and indicators for future improvement opportunities. Measures performance against process requirements, aligning improvement projects to close performance shortfalls.
Process/QA	Quality Engineer	Responsible for activities involving quality assurance and compliance with applicable regulatory requirements. Conducts audits and reviews/analyzes data and documentation. Uses the organization's resources to enhance customer satisfaction Evaluates improvements to various systems. Ensures that data and information are sufficiently accurate and reliable (ACS Role – Quality Assurance)
ASG	Applications Architect	i.e., Technical Lead/Architect Applications/System Architect - SW/HW/Network Architecture design and coordination
ASG	Sr. Developer	i.e., Middleware Engineer (ACS Role-application development)
ASG	Jr. Developer	Designer, Web Developer, Graphics, Content Manager, Functional Test analyst (ACS Role-Web Development, content management)
ASG	System Administrator	
IRM	Information Architect	Database Design, Information Design, (ACS Role-Applications Architect)
IRM	Database Administrator	(ACS Role-Application database design)
Sec Oper	Security Engineer	Network and Application Security Engineer, (ACS Role-platform project support)

COE	Primary Role	Description
Sec Oper	Security Architect	Operates within the Security discipline to drive common approaches / design throughout the Enterprise. (enterprise=County + for that discipline) (i.e., Wes Kanamori, Gary Mills)
NPS	Build Network Engineer	LAN/WAN Build and Transition Engineer, ACS-platform project support
NPS	Build Systems Engineer	x86 Server Infrastructure Build and Transition Engineer, ACS-platform project support
NPS	Design Engineer	Operates within the Network and Platform Services discipline to drive common approaches throughout the enterprise and to properly scope and design solutions for NPS Build Team. (Service Design Group)
NPS	Operations Network Engineer	LAN/WAN Operations Engineer, ACS-platform project support
NPS	Operations Systems Engineer	x86 Server Infrastructure Operations Engineer, ACS-platform project support
TSD	Telephone Engineer	i.e., County Network Engineer, (ACS Role-Moves, Adds, Changes)
TSD	Telephone Technician	Various telephone technical positions
TSD	Telephone Services Specialist (TSS)	i.e., AT&T Service Manager, Network Engineer, SL200 MAC, M1 MAC, Voice Mail Engineer, ACS-Moves, Adds, Changes
Oper	Facilities Engineer	Maintain Facilities i.e., Facilities Specialist
Oper	Technical Support	Tech Support Team for Mainframe, Other Technical Support staff (ACS Role-Operating systems technical support)
Oper	Document Management Technical Support	(ACS Role -document management technical support)
Oper	Network/Computer Operator	Network Operations Center Operation, other computer operator roles (ACS Role-Scheduling support)
Oper	Support Specialist	Operations Support Specialist, General Support Specialist staff (ACS-Scheduling support)
Fin/Contract	Purchasing Specialist	
Fin/Contract	Accounting Specialist	
Fin/Contract	Finance Specialist	
General	Division Manager	Manages various divisions/units of our organization i.e., Operations, Servers and Networks, Application Services, IT Management, Billing Manager, Business Continuity Manager, etc.
General	Third Party Vendor	Professional Services
General	Admin Support	
General	Customer	

4.4.3 Baselining Projects

A schedule baseline refers to the planned start and end dates of the project. The baseline provides the ability to measure project schedule performance during execution. Project Managers will be required to baseline their projects as defined within the Design and Build Schedules Section.

4.4.4 Additional Schedule Re-baseline Criterion

A project may also be re-baselined for the following valid, PMO approved reasons:

- The technology being implemented will be dramatically enhanced in the near future.
- Synchronizing with another project to leverage or advance both.
- New technology or alternatives became available since the initial project was conceived; causing consideration of a new direction that would be more advantageous.
- No or maybe one response is received during a Request for Proposal. This may indicate that project requirements and specifications need to be revised.
- Approved change in scope, which will impact schedule to meet new requirements.
- Project dependency with a partnering entity that is outside of the Agency's control (i.e., Superior Court, another county, etc.)

Exit Criteria from Planning Phase: *Scope and project planning documents are approved by Sponsor.*

4.5 Executing/Controlling Phases

During Project Execution, the Project Manager and team complete project deliverables according to plan and measures project performance regularly to identify variances from the plan. All progress on the project is closely monitored and reported to key stakeholders. Bi-Weekly status, Risk/Issues/Change requests, Budget and Schedule are all managed within Clarity.

Project Controlling is the control of the project activities and the procedures used for the on-going planning, execution, and monitoring of the project during execution. The Controlling process involves the following core processes and will be tracked and managed within Clarity:

Process	Description
Overall Change Control	A controlling mechanism to ensure that all requested changes to the project are appropriately documented, reviewed, and approved or denied.
Scope Change Control	Concerned with identifying and documenting any changes to the defined scope and the process for managing the identified changes and affects to budget and schedule.
Schedule Control	An ongoing process, which takes place throughout all phases of a project; allows the Project Manager to review and update the schedule, predict timing of future activities, foresee future problems and take corrective actions, report project progress against baseline and see if the original estimates were accurate
Cost Control	Concerned with influencing the factors that create changes to the cost baseline to ensure that the changes are agreed upon, determining that the cost baseline has changed, and managing actual changes when they occur.
Quality Control	Monitoring specific project results to determine if they comply with relevant quality standards and identifying ways to eliminate causes of unsatisfactory performance.
Communication Management	Collecting and dissemination of performance information; this includes status reporting, progress measurement, and forecasting.
Risk monitoring and control	Track identified risks, continue to identify new risks, and execute the planned responses for the risks, which do occur

Process	Description
Issue Management	Create issues from risks that happen to support awareness, actions, and tasks for conclusion by the project team.

4.5.1 Bi-Weekly Status Reporting

A project reporting process has been established to communicate the status of all CEO/IT projects. This process includes regularly scheduled meetings with upper management as well as reviewing the Bi-Weekly status report and Status dashboards within Clarity. Project Managers are required to update their project information in Clarity to prepare for bi-weekly reviews. The Bi-Weekly status report includes the following:

Bi-Weekly Status Data Fields	Description
Schedule Status	Drop Down Selection: Green = Less than 5 days late Yellow = 5 to 30 days late Red = More than 30 days late
Budget Status	Drop Down Selection to reflect the latest forecast: Green = Less than or equal to approved budget Yellow = 1-10% over approved budget Red = More than 10% over approved budget
Expended or Encumbered To Date	Manually enter the amount expended on the project.
Status Comment	Describe the most current status of the project. Discuss mitigation plans for Yellow/Red status on the schedule and/or budget.
Accomplishments	List key accomplishments for the 2 week reporting period
Planned Activities for Next Period	List upcoming project activities with estimate completion dates
Board of Supervisors Quarterly Report Section - This section is provided for reporting on projects included in the BOS Quarterly Report for all projects over \$250,000	
Include in Quarterly Report	Check box to include project on report
Owning Agency/Department	Identify agency as displayed on the report
Category	Drop down selection: <ul style="list-style-type: none"> ▪ Agency/Department ▪ ATS ▪ CAPS ▪ CEO
Funding Source	Identify funding source as displayed on the report
Budget/Schedule comment	Enter pertinent information related to the budget/schedule status
Key Accomplishments	List key accomplishments for the current reporting period

4.5.2 Risk and Issues

Project Risks, Issues and Change Requests are all managed within Clarity. The process of Risk Management includes the identification, analysis, planning, tracking, and communication of risk. Risk strategies help Project Managers more effectively address uncertainty, thereby minimizing the costly consequences of unforeseen or unmanaged problems. Making informed decisions by consciously assessing potential problems and the severity of their impact is at the heart of project risk management. (Refer to Section 6 Appendix B-Guidelines for detailed Risk, Issues and Change Management guidelines)

In Clarity, Project Managers can identify risks at any time during a project. Once a risk appears likely to impact or has impacted the project, it can be escalated to an issue. Change Requests often result from risk and issue identification, and can help facilitate effective resolutions. Project Managers have the ability to convert risks to issues, issues to risks, and both to change requests.

The Risk Management features within Clarity are as follows:

- **Risks:** Create, assign, and track risks, and design response strategies for them.
- **Issues:** Create, assign, and track issues
- **Change Requests:** Create, assign, and track change requests.
- **Category:** Identify the primary area that will be impacted (Budget, Schedule, Resources, Scope, Technical, Organizational)
- **Risk Rating:** Rate the probability and impact as Low, Med, or High. Clarity will summarize the risks by category and calculate the overall rating on the Project Risk sub-page.

4.5.3 Change Management

Change Management is execution of the Change Management Plan to control changes to quality, scope, cost and schedule. Project Change Management occurs on a continual basis in many areas of a project, whether that is scope, schedule, or cost.

The process to define, track and resolve changes includes the following elements:

- Define that a change to the baselined project plan is needed (change that could affect scope, schedule or cost) by recording a Change in Clarity
- Complete a Change Request Form (Clarity Knowledge Store) and submit it to the Project Sponsor
- Project Sponsor reviews and approves Change Request
- Project Manager updates project plan to reflect project change

4.5.4 Project Status Dashboard

The PMO has established a Project Status Dashboard to provide a high-level overview of all approved projects within the CEO/IT organization and provides a drill down to each project to view more details. This feature will help facilitate project reviews by CEO/IT Division Managers. Filters can be created and saved to customize the Status Dashboard project list view.

The Project Status Dashboard can be accessed from the Overview page within Clarity and provides filters to display the following information:

Column Field	Description
Project ID	Auto-generated number
Project	Project Name
Start	Project Start
Finish	Project Finish
Program Manager	Assigned Program Manager
Project Manager	Assigned Project Manager
Resource Strategy	Resource strategy identified on the project
Original Budget	From approved Budget Plan
Budget Adjustments	Revised dollar amount with the approved Budget Plan
Modified Budget	From revised Budget Plan
Expenses/Encumbrances To Date	Manual entry by Project Manager on the Project Status page
Current Phase	From Project General Properties page
Bgt Status	Budget Status from Project Status page
Schedule Status	Schedule Status from Project Status page
From the Project Risk Page	
Technical Risk	
Schedule Risk	
Bgt Risk	
Resource Risk	
Scope Risk	

Column Field	Description
Org Risk	
Risk Count	Number of active Risks
Issue Count	Number of active Issues
Change Count	Number of active Change Requests
From the Project Financial Identifiers	
Work Request	
Elvis Account Code	
County Labor Code	
Fund	
Agency	
Org	

Exit Criteria from Executing/Controlling Phase: Signed Acceptance of project deliverables by Sponsor.

4.6 Closing

The Closing Phase includes final details for completing a project. The Project Manager should resolve any final project details, and obtain customer acceptance of final deliverables. Using the Closing and Lessons Learned Guidelines in the Clarity Knowledge Store, Project Managers will conduct a lessons learned session with the project team. All project information will be reviewed and lessons learned documented. Before closing the project, the Project Manager is responsible to ensure all required Project Artifacts are stored in the Clarity Project Collaboration folder for future project reference.

It is recommended that a closing session be performed following each phase of a project to capture more accurate information on your project.

The PMO will review the Clarity Project Collaboration Folder and will use any lessons learned to improve the project management templates, guidelines and best practice references within the Clarity Knowledge Store.

Exit Criteria from Closing Phase: Project signoff by sponsor. Project Close documents reviewed by PMO.

5 Appendix A – Project Artifacts

5.1 Project Artifact Requirements

This section will identify the project artifact requirements based upon project type and size, and whether they are fields stored within Clarity to capture required project data or document templates that are accessed from the Clarity Knowledge Store-Project Artifact Templates Folder (Clarity KS).

Document templates that are utilized will be uploaded into the Clarity Project Collaboration folder to establish a centralized project document repository.

5.1.1 All Project Types and PMO Requirement Guideline

Project Artifacts	Project Type	Description	Small 100-500 hours	Medium 500-1000 hours	Large >1000+ hours
Idea/Concept					
Idea/Concept	All (PMO Req)	Clarity Idea supports the key data elements that make up a concept paper			√
Feasibility Phase					
High-Level Timeline	All (PMO Req)	Within Clarity – May use project schedule template based upon project type for high-level project schedule. Drill down into phases for more detailed WBS for larger projects.	√	√	√
Project Scoring	All (PMO Req)	Complete all fields within Clarity Project sub-page		√	√
Financial Plan ▪Cost Plan ▪Benefit plan ▪Customer TCO Estimate	All (PMO Req)	Use the Cost/Benefit or TCO worksheet to define the cost estimates and reference this information to create the Cost and Benefit Plan in Clarity.		√	√
Business Case Document (Information System Request)	All (PMO Req)	Document is used to obtain sponsor budget approval. This document mimics the Information System Request (ISR) required for all projects greater than \$150,000.		√	√
Initiation Phase					
Charter	All (PMO Req)	Complete document template in Clarity	√	√	√
Budget Plan	All (PMO Req)	It is created once the Cost and Benefit plans are approved within Clarity Financial Plan sub-tab		√	√
Planning Phase					
Project Team	All (PMO Req)	Within Clarity - Build team by assigning resource roles to the project and working with Resource Managers to book resources for the project.		√	√
Work Breakdown Structure (WBS)	All (PMO Req)	May use project schedule template in Clarity as a starting place and revise with project team to create the detailed WBS and work estimates for specific tasks.	√	√	√
Project Risks	All (PMO Req)	Within Clarity-Project Risk sub-page - Measure overall project risk and log individual risks using the Risks/Issues/Changes tab. Also, within the Project Plan document in Knowledge Store.		√	√

Project Artifacts	Project Type	Description	Small 100-500 hours	Medium 500-1000 hours	Large >1000+ hours
Project Plan Document	All (PMO Req)	Elaborates information from the Business Case and Charter. Includes detailed scope, WBS, schedule, resources, budget plan, Roles & Responsibilities and Risk, Communication and Change Management Plans		√	√
Requirements Definition	All (PMO Req)	Clarity Knowledge Store-Requirement Definition		√	√
Architecture Drawing and Process Flow	Infrastructure Process Re-Engineering App Dev/COTS Telephone Services	Defines the solution data and network architecture based on RDD.	√	√	√
Other Documents:					
Three Point Estimate Worksheet	App Dev/COTS	Clarity Knowledge Store-App Dev and SW	√	√	√
Testing Plan	App Dev/COTS			√	√
Training Plan	App Dev/COTS			√	√
Rollback Plan	Infrastructure Process Re-Engineering Telephone Services		√	√	√
Backup Schedule	Infrastructure Process Re-Engineering Telephone Services		√	√	√
Configuration Management Plan	App Dev/COTS	Clarity Knowledge Store-App Dev and SW			√
Executing Phase					
Bi-Weekly Status Reporting	All (PMO Req)	Update the Status page with accomplishments and next steps within Clarity Project sub-menu	√	√	√
WBS Tracking	All (PMO Req)	Update schedule dates and task status on a weekly basis		√	√
Budget/Schedule Metrics	All (PMO Req)	Measure Budget and Schedule status for current reporting period.		√	√
Other Documents:					
Conceptual Design Checklist	App Dev/COTS	Clarity Knowledge Store-App Dev and SW			√
Software Product Design	App Dev/COTS	Clarity Knowledge Store-App Dev and SW			√
Software Product Tech Spec	App Dev/COTS	Clarity Knowledge Store-App Dev and SW			√
Programming Checklist	App Dev/COTS	Clarity Knowledge Store-App Dev and SW			√
System Test Case Template	App Dev/COTS	Clarity Knowledge Store-App Dev and SW			√
Test Case Template	App Dev/COTS	Clarity Knowledge Store-App Dev and SW			√
Test Checklist	App Dev/COTS	Clarity Knowledge Store-App Dev and SW			√
Uses Cases	App Dev/COTS	Clarity Knowledge Store-App Dev and SW			√
Controlling Phase					
Risk, Issues and Change Requests	All (PMO Req)	Use Clarity Project Risks/Issues/Changes Tab to track throughout the project life cycle		√	√
Budget/Schedule Metrics	All (PMO Req)	Measure Budget and Schedule status for current reporting period within the Clarity Project Status page			√
Closing Phase					
Lessons Learned Document	All (PMO Req)	Template at Clarity KS \Project Planning		√	√
Closing Document	All (PMO Req)	Template at Clarity KS \Project Planning		√	√
Customer-PMO Appraisal forms	All (PMO Req)	Template at Clarity KS \Project Planning		√	√

5.2 Project Artifact Templates

Project Artifact (document) templates are stored within the Clarity Knowledge Store and should be used as indicated by the Project Artifact Requirements based on project type and size. These templates will capture project information in a document format outside of the Clarity system data fields. Document templates that are utilized must be uploaded into the Clarity Project Collaboration folder to establish a centralized document repository within each project.

The Project Artifact templates have been placed into the following general categories and can be retrieved from the Clarity Knowledge Store:

5.2.1 Project Management Artifacts

- Business Case
- Project Cost/Benefit Spreadsheet
- Charter
- Project Plan
 - Detailed Scope
 - Risk Management Plan
 - Communication Plan
- Lessons Learned
- Project Closeout

5.2.2 Requirement Definition

- Business Requirement Definition
- Technical Requirement Definition
- Business Technical Requirement Definition
- Requirements Checklist

5.2.3 IT Infrastructure

- Backup Schedule
- FARMS – Virtualized Environment Reference Document
- Infrastructure – Drawing
- Infrastructure – Architecture, Readme
- Infrastructure – WAN Communication

5.2.4 Application Development and Software Implementation

- Configuration Management Plan
- Summary and Problem Identification
- Three Point Estimate Worksheet
- Conceptual Design Checklist
- Software Product Design
- Software Product Tech Spec
- Tech Spec Checklist
- Programming Checklist
- Responsibility Matrix
- System Test Case Template
- Test Case Template
- Test Checklist
- Use Cases
-

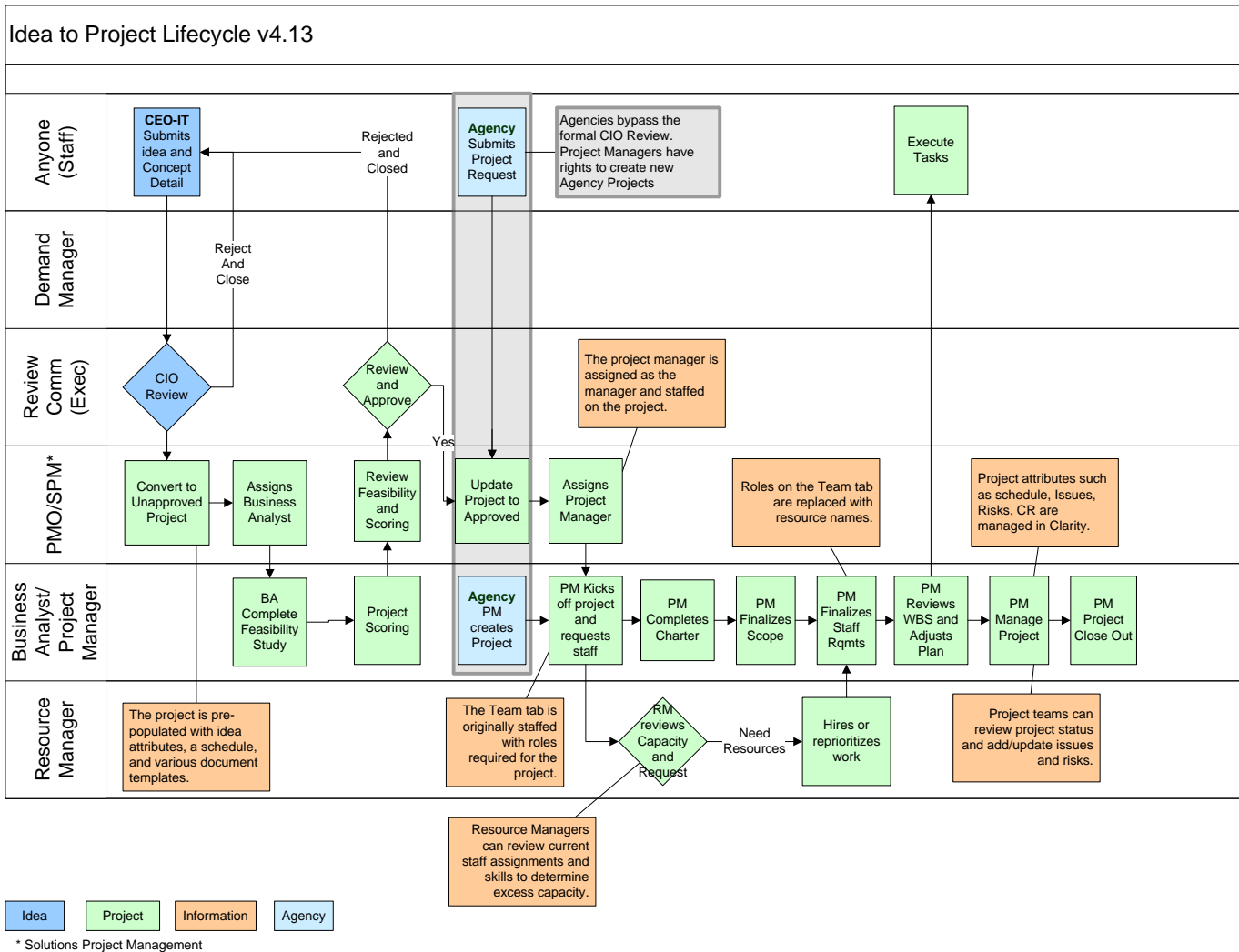
6 Appendix B – Project Management Guidelines

In conjunction with the Project Management Methodology, the PMO has developed guidelines for the following topics. These Guidelines are stored within the Clarity Knowledge Store-Project Management Guidelines.

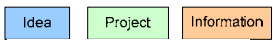
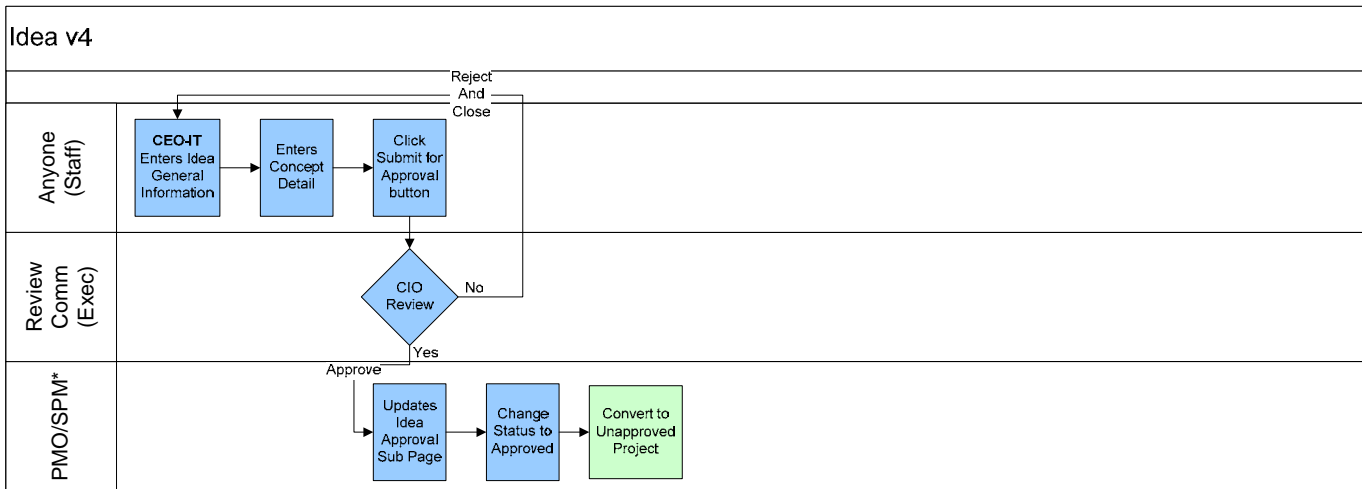
1. Budget/Financial Planning
 - a. Cost Benefit Plan Worksheet
 - b. Total Cost of Ownership (TCO) Spreadsheet
2. Risk Management
 - a. Risk Management Checklist
3. Issue Management
4. Change Management
5. Lessons Learned
6. Project Closeout

7 Appendix C – Detailed Project Life Cycle Workflow

7.1 Idea to Project Lifecycle

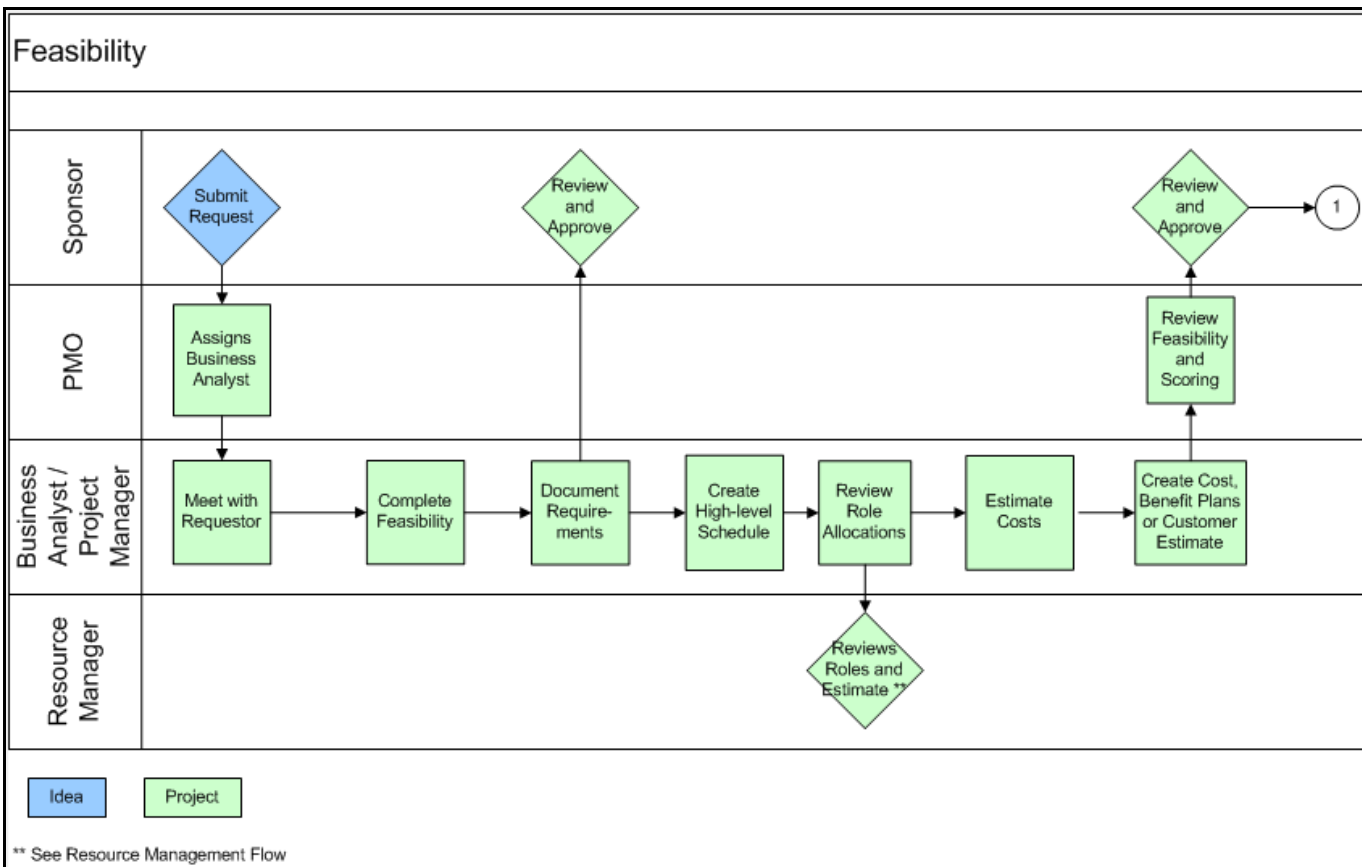


7.2 Idea Detail Workflow



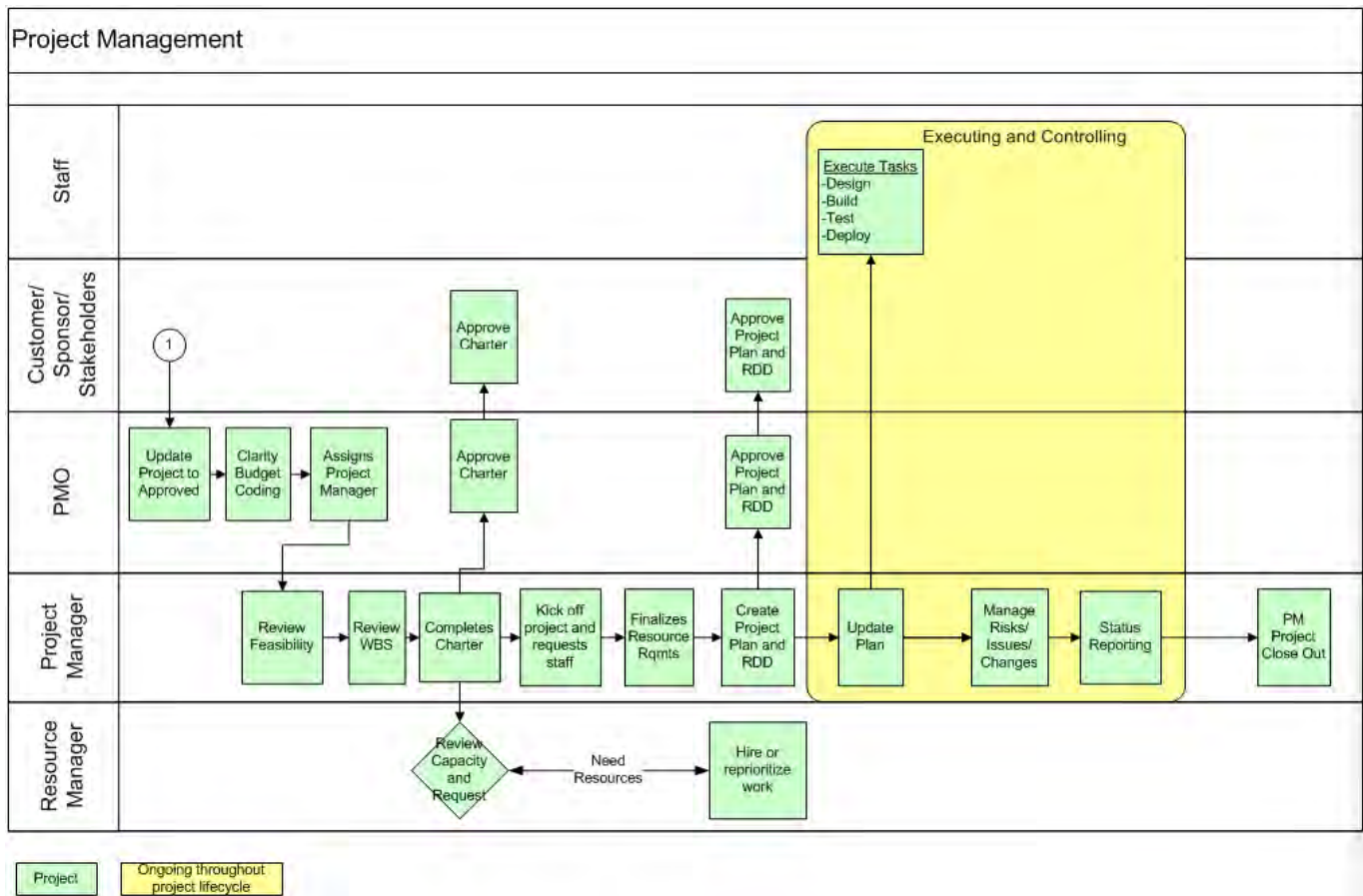
* Solutions Project Management

7.3 Feasibility Study Workflow

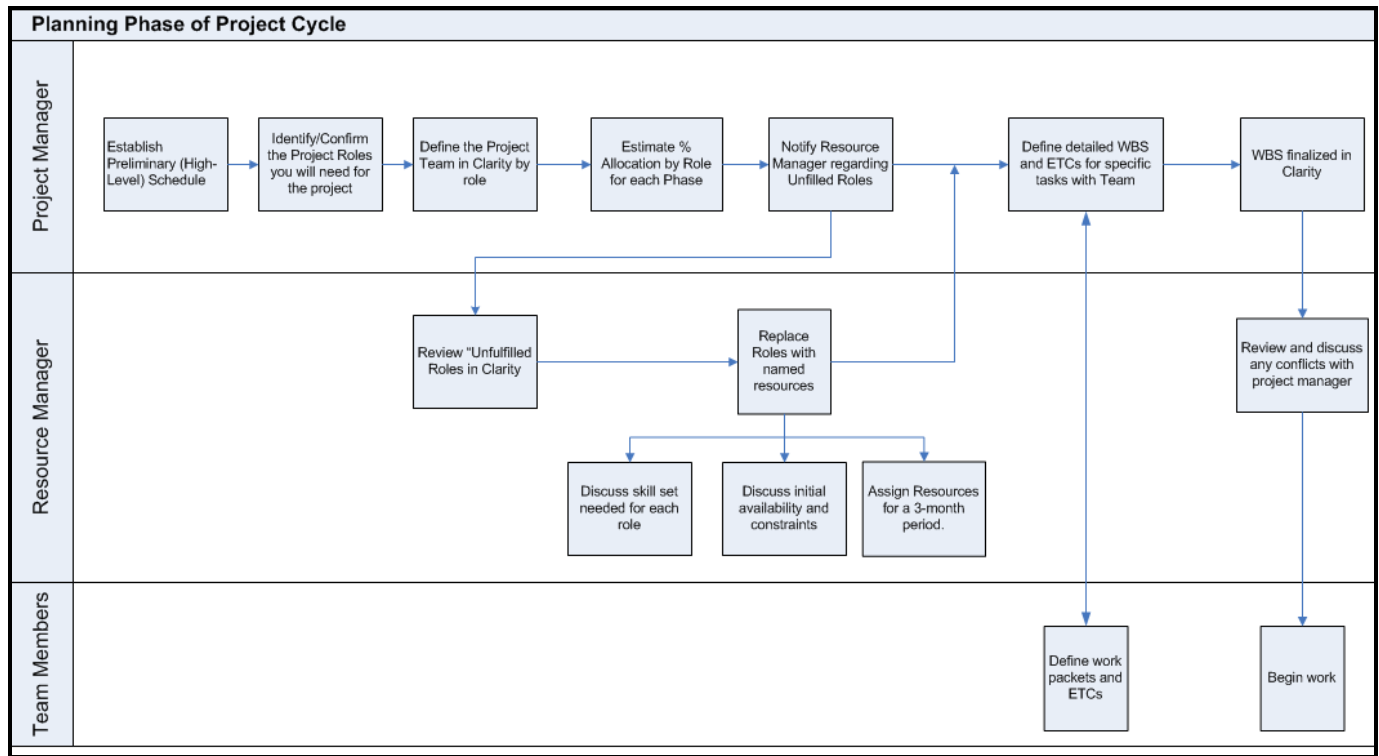


** See Resource Management Flow

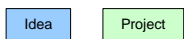
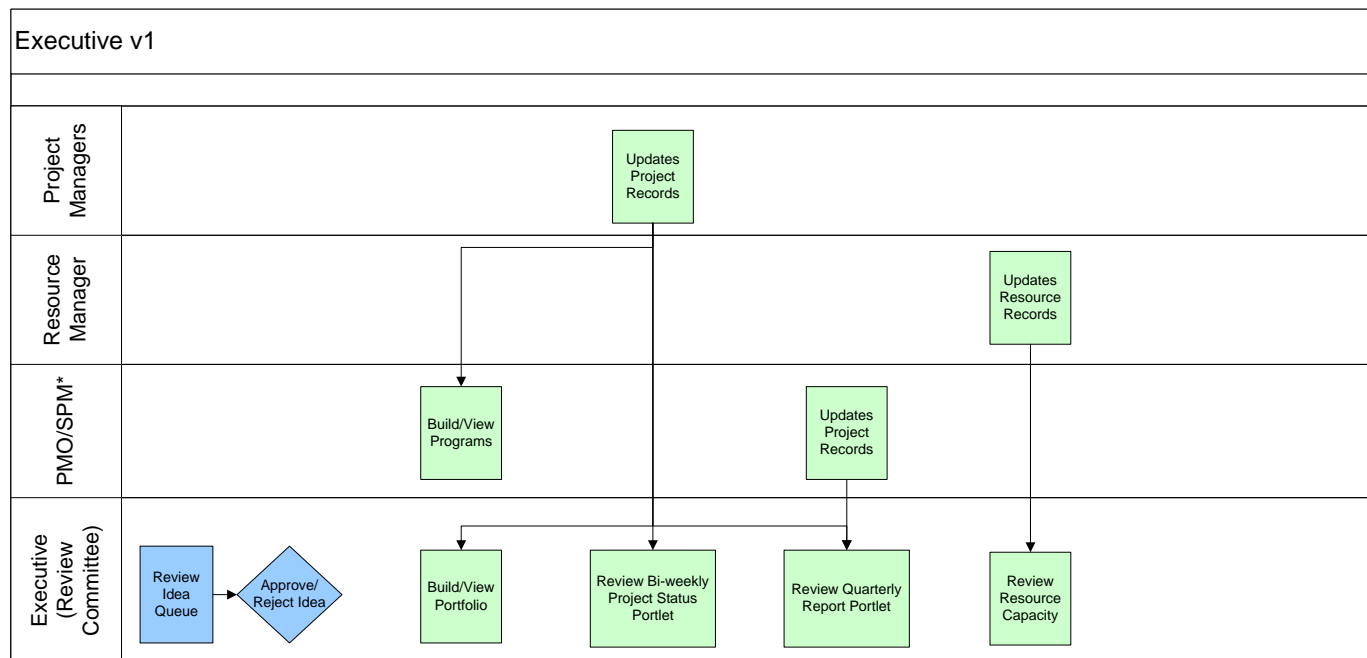
7.4 Project Management Workflow



7.5 Resource Management Workflow



7.6 Executive Workflow



* Solutions Project Management

