



OC-PMO-POL-001 – Countywide Information Technology Project Management

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1 Policy Statement

The CEO/IT Program Management Office (PMO) is established for the purpose of providing guidance and helping to ensure the success of County Information Technology (IT) projects through the implementation of a Countywide Project Management methodology, IT project funding process, provision of formal project oversight, and training to create awareness of IT Project Management best practices. This policy outlines the specific responsibilities of the CEO/IT Program Management Office.

2 Purpose

The purpose of this policy is to define the responsibilities of the CEO/IT PMO, including establishment of the County Information Technology Project Management methodology and IT project governance, funding, oversight and reporting to the Board of Supervisors.

3 Applicability

This policy is applicable to all Orange County Agencies and Departments.

4 Responsibility

The Deputy CEO/Chief Information Officer or his/her designee is responsible for compliance with this policy and ensuring that the policy is reviewed, approved, distributed, published and maintained as appropriate.

5 Policy Description

The CEO/IT PMO shall provide structure and leadership for managing County IT projects through the establishment and implementation of a consistent project management methodology, policy, standards, processes and tools. All County Agencies shall comply with the established Countywide IT Project Management Methodology.

5.1 Orange County IT Project Management

The CEO/IT PMO shall provide structure and leadership for managing County IT projects through the establishment and implementation of a consistent project management methodology, policy, standards, processes and tools. All County Agencies shall comply with the established Countywide IT Project Management Methodology.

- 5.1.1 PMO establishes a Countywide IT Project Management Methodology. (See The County of Orange Project Management Methodology Handbook).
- 5.1.2 PMO establishes standards and minimum requirements for managing IT projects.
- 5.1.3 PMO provides IT Project Management training as required or requested by Agencies/Departments.



5.2 IT Investment Review Board

The CEO/IT PMO shall establish rating criterion and lead the IT Investment Review Board in evaluating the Business Cases for all County Agency/Department IT Project Requests \geq \$150,000 (excluding County staff costs) and provide funding recommendations to the IT Executive Council.

- 5.2.1 Business Cases for projects requesting 038 funds are evaluated, scored, prioritized and 038 funding recommendations made to the CIO and IT Executive Council.
- 5.2.2 Business Cases for Agency/Department funded projects are reviewed by the IT Investment Review Board and those that demonstrate alignment with Agency business objectives and have sound business cases are recommended for budget approval to the IT Executive Council and CEO/Budget.
- 5.2.3 County staffing costs are identified as part of the Business Case; however, the \$150,000 cost threshold does not include County staff costs (with the exception of in-house application development projects).

5.3 CEO/IT PMO Manages All IT Projects \geq \$1,000,000 or that Impact Multiple Agencies/Departments

The CEO/IT PMO shall assign a Project Manager to perform formal Project Management of County IT projects \geq \$1,000,000 (excluding County staffing costs), or that involve multiple agencies/departments. (See Board Directive # 25, 2/7/2012.)

Note: Agencies/Departments that have a qualified Project Manager staff person may provide justification to the CIO for review/approval. (See Project Management Exception Justification Form.)

- 5.3.1 The assigned PM will be a certified Project Management Professional (PMP) with a minimum of five years' project management experience managing large IT projects.
- 5.3.2 The assigned PM will be required to comply with the CEO/IT Project Management Methodology. This includes:
 - 5.3.2.1 Submit required project management artifacts (see CEOIT-PMO-STD-009 – Project Artifact Requirements) to the CEO/IT PMO Director for approval.
 - 5.3.2.2 Maintain the project schedule, risks, issues, changes and bi-weekly status updates in the CEO/IT Portfolio Management system.
 - 5.3.2.3 Attend the bi-weekly CEO/IT Project Portfolio meeting to provide project status to the CIO as determined necessary by the CIO.
- 5.3.3 The Agency/Department will be required to cover the cost for the PM assigned and the license cost for use of the CEO/IT Portfolio Management system.



5.4 IT Project Status Reporting

- 5.4.1 The CEO/IT PMO shall provide quarterly IT Project Status Reporting for IT Projects \geq \$150,000 that are considered new development or system upgrades. (These do not include on-going IT maintenance or computer refreshes.) For IT projects \geq \$1,000,000, Risk Assessments will also be provided. Note: Dollar amounts exclude County staff costs.
- 5.4.2 CEO/IT Program Managers are assigned to work with the corresponding Agency Project Managers to ensure accurate IT Project quarterly status updates are provided. The PMO partners with County Project Managers to ensure that required project planning documents and artifacts required per the Countywide Project Management Methodology are completed.
- 5.4.3 The Director, PMO, works with the Agency Project Manager to assess the project and perform a Project Risk Assessment of all projects \geq \$1,000,000, reviewing overall project management, required project artifacts and risk management strategies. The Risk Assessment Report will be filed quarterly with the IT Project status update.
- 5.4.4 Quarterly IT Project Status updates and Risk Assessments are maintained in the Clarity IT Portfolio Management system and can be viewed online.

5.5 Project Management Tools and Resources

The CEO/IT PMO provides guidance and coaching to Project Managers to ensure effective project management.

- 5.5.1 Upon request, the PMO provides project management training to County IT Project Managers and project staff.
- 5.5.2 The PMO will maintain a repository of project documents, lessons learned and best practices in the Clarity IT Project Portfolio System to facilitate future project planning.
- 5.5.3 The PMO will facilitate a quarterly Project Management Community of Practice to facilitate information sharing and learning opportunities.

5.6 Independent Project Oversight, Verification and Validation

The CEO/IT PMO provides Independent Project Oversight/Independent Verification and Validation (IPOC/IV&V) services as requested. This includes oversight of projects to ensure that they are following appropriate project management standards and sound technical practices based on the type of IT project.



6 Definitions

Term	Definition
CEO/IT Project Management Methodology	CEO/IT has tailored the basic Orange County Project Management Methodology, templates and guidelines to meet specific business needs of the organization using the CIO's IT Portfolio Management Solution, Clarity. These documents can be accessed in the Clarity Knowledge Store by authorized users. This 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.
Clarity IT Portfolio Management Tool	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: <ul style="list-style-type: none"> ▪ A repository of all CEO/IT Projects and Countywide Projects over \$150,000 that are reported to the Board of Supervisors quarterly. ▪ Best-practice project execution and resource optimization that leads to greater IT efficiency and accountability ▪ Standardized project templates, guidelines and samples ▪ Project status reporting history
Countywide Project Management Methodology	The OC Project Management Methodology is a compilation of project management methods and practices. This document represents a framework of all the major elements of the methodology and, contains references to supporting process documents, tools and templates, which provide a deeper level of detail and can be tailored to meet Agency/Department requirements.
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.

7 Related Documents

No.	Title	Issued By
	Project Management Exception Justification Form	CEO/IT PMO
CEOIT-PMO-STD-002	Project Artifact Requirements	CEO/IT PMO
CEOIT-PMO-STD-001	CEO/IT Project Management Methodology	CEO/IT PMO
No. 25	Board Directive 2/7/12	COB



8 Revision History

Date	By	Ver. #	Description
5/8/12	M. Campbell	1.0	Submitted to IT Executive Council for review

9 Approvals

Date	Approver Name	Signature
5/10/12	IT Executive Council	Approved with minor changes