Section 1: *Overview*

Overview

The *Project Management (PM)* processes documented in this *PM Handbook* were developed by members of the *IT Advisory Group*. The team, assisted by an *Applied Business Technology (ABT) Corporation* (now *Broadcom*) consultant, developed and implemented a *PM Information System* for approved and scheduled projects, so that accurate estimates can be developed, projects can be delivered on time and within budget, and accurately predict the effect that changes in priorities or resources will have on project start and end dates.

Roles and Responsibilities

Mike Timm, Deputy Chief Information Officer is ultimately responsible for the adherence to the standard process and procedures throughout *IT*.

PM Officers, Janette McKenna, Sue Proksch and Kary Goisdzinski are responsible to:

- Provide *PM* mentoring, support and current *PM* practices.
- Provide internal *CA Clarity* application assistance.
- Act as central *Clarity* contact, implement product updates and upgrades.
- Perform department wide analysis and provide trends and recommendations.
- Prepare, develop and maintain all *PM* processes, including the *PM Handbook*, *Global Calendar* and *Work Breakdown Structure (WBS)* templates.
- Conduct project review and analysis.
- Provide project assurance and compliance to standards.
- Prepare and present *IT Annual Master Plan*.
- Prepare and present *Quarterly Leadership Group Reports*.
- Assure and facilitate *IT Leadership Group* processes and procedures.
- Monitor and report project variances and billing exceptions.
- Review issues at project close.
- Prepare S*cope Budget Increase* for *IT Steering Committee* review.
- Review *Return on Investment* for project compliance.
- Maintain, facilitate, and execute *PM* core competencies and current practices.
- Prepare and consolidate reports for senior management.

The *IT Steering Committee* is responsible for determining the standards and guidelines documented in this handbook to be used by *Project Managers* for planning, controlling and reporting purposes. Among the decisions required by the *IT Steering Committee* are:

- Define the *Organizational Breakdown Structure*.
- Define roles and responsibilities for the project.
- Determine appropriate methodologies and *WBS* level names.
- Define the high-level *WBS*.
- Define file naming conventions.
- Define project naming conventions (name, ID, department).
- Define project level defaults (task duration type, loading pattern, work week).
- Define resource assumptions (availability, abbreviation, unit of measure, billing rate).
- Define planning, controlling, and reporting requirements.
- Define project tracking criteria.
- Design task and resource coding for summarized reporting.
- Design multiple project models.
- Design structure and process for inter-project dependencies.
- Determine tracking roles and responsibilities (submit, approve, post).

The *IT Steering Committee* members are responsible for approval of all projects submitted through the *IT* project approval process. This group also provides guidance and direction in prioritization to the *Project Management Office (PMO)*.

Name	***Role/Position***
Mike Timm	Deputy Chief Information Officer
TBD	Manager, Technical Systems & Networking
Jim Manning	Director, Application Services (Criminal Justice)
Tammi Shepherd	Director, Application Services (Core Systems)
Janette McKenna	Manager, Internal Services
EJ Widun	Chief Technology Officer
TJ Fields	Chief Information Security Officer

Beginning in August 1996, the *IT Team Project Managers* participated in testing department and project-level standards and guidelines. Specific projects were identified for which they created initial project plans. All *Application Services* and *Technical System & Networking* created team plans which were scheduled, accruals tracked, progress analyzed, and plans revised. The *Project Managers* were mentored by the *Clarity* consultant on these projects during the testing phase.

Project Management Handbook Objectives

This handbook provides a detailed guide for determining the processes which must be followed to rapidly and successfully implement a project management information system. It documents the standards and guidelines that have been adopted by the *IT Steering Committee* for use at *IT*. It also provides step-by-step instructions for using *Clarity* as *IT's PM* software system.

This handbook *does not* unnecessarily duplicate the *Clarity User Guides*. Instead, it focuses specifically on the *Clarity* application within *IT*, and establishes standards and conventions that must be followed to ensure consistency where needed.

S *A standard is considered required, is not optional and is indicated by this sample shown here (a box with a shadowed and bolded "S"). PMO will be monitoring these standards to ensure compliance. Those standards not adhered to will be brought to the attention of the non-compliant employee and his/her supervisor.*

G *A guideline is also presented and optional when consistency is not required across projects. They are indicated by this sample shown here (a box with a shadowed and bolded "G"). As much flexibility as possible is incorporated; however, guidelines are frequently provided to facilitate plan building.*

The handbook follows the logical project management from project profiling through project analysis. It includes step-by-step procedures required to develop repeatable planning, estimating, scheduling, tracking, analyzing, and reporting processes within *IT*. It also includes tips and techniques, along with questions and answers to ask about a project plan and reports to help ensure the quality and consistency of the plans.

Finally, the handbook presumes users have a familiarity with the *Clarity* software described herein at least at the level equivalent to a student who has successfully completed *Clarity's Project Management Fundamentals* workshop. It assumes the user has used the *Clarity* application to the extent they are comfortable with features, functionality, views, and keystrokes, and are now ready to employ the tool in *IT's* specific environment.

Handbook Updates

Suggested changes or revisions to this handbook will be handled as follows:

- Submit suggestions to *PMO* in writing.
- Present suggestions to and obtain approval of *IT Steering Committee.*
- Publish a memo and revisions to handbook specifying the changes.
- Update the revision log.

Development Methodology

IT has chosen to utilize *Project Quick Start (PQS) Methodology.* A methodology is a set of practices or roadmap for successful systems development. It delivers development practices that have been proven and established over years of experience. All tasks have clearly defined deliverables that are specified, not just hinted or implied. This methodology provides a starting point for the potential phases, activities, and tasks for a particular type of project. It allows *IT* to establish standards by which a database of actual hours is established and used in estimating future projects.

Training Philosophy

For those individuals who will be leading projects, the *IT PM's* training philosophy is:

1. Employee will complete the *Computer Based Training (CBT)* course entitled *Project Scheduling with Clarity Open Workbench* which is available by contacting a member of the *PMO* team. This course is geared toward learning how to use Clarity Open Workbench.

2. Employee will complete the *Computer Based Training (CBT239)* course entitled *Overview of Project Management* and *Computer Based Training (CBT208)* course entitled *Communication Skills and Project Management* from *Oakland County HR Training & Development*. These courses are geared toward those just beginning their *PM* efforts. The CBTs can be checked out by completing the *HR Training Course Registration Form* by clicking here and following the instructions. An expected completion date is needed for each course and you must have your supervisor sign the completed form prior to submitting it.

3. Employee will complete the *Fundamentals of Project Management* class. This is a 1-day practical hands-on course that teaches the real-world fundamentals needed to run a successful project. The course leads participants from the *Initiation* stage of a project, through *Planning*, *Control* and *Closeout* phases using business examples, exercises and simulations. (The *Clarity* application training is *not* covered as part of this class).

4. Employee will be mentored by *PMO* on their first project when they complete the above training. The mentored project should be identified prior to the training.

Those who have already been trained should be mentored on their first project by *PMO* when they have a real project to lead.

It is not recommended that "tutoring" by co-workers be an employee's first experience in leading a project. By utilizing *PMO* to start the employee off right will help *IT* maintain its investment in the system, process, and standards.

If additional PM training courses are being requested by the Resource Manager, PMO will review the course content and provide a recommendation to the Resource Manager and Division Manager. Once approved the Project Manager may enroll in the course.