



City Of Tampa Project Management Guidebook

City-Wide Project Management Program

Version 1.1

For the complete set of project management templates, which complement this guidebook, see the City of Tampa iNET - Technology and Innovation Department - [Enterprise Change Management Division](#): Project Management Program. There you will find a comprehensive suite of templates to help you complete *every step* in the project lifecycle.

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Introduction

Overview

The City of Tampa Project Management Guidebook was developed to document a common methodology for managing projects in the City (a Project Management Methodology).

This Guidebook is the result of many months of collaborative effort on the part of the Project Management League (PML). This is a group of key individuals from several city departments who have been selected based on their knowledge and experience in Project Management.

It is recognized that this Project Management Methodology must be scalable to meet the requirements of various sized projects in all departments.

This methodology is designed to meet the needs of various city departments and be in support of the *Project Management Institute's* (PMI ®) *A Guide to Project Management Body of Knowledge* (PMBOK ®).

The purpose of the PMBOK:

"The primary purpose of the PMBOK Guide is to identify that subset of the Project Management Body of Knowledge that is generally recognized as good practice. "Good practice" means that there is general agreement that the correct application of these skills, tools, and techniques can enhance the chances of success over a wide range of different projects."

The City of Tampa has established a City-Wide Project Management program to reinforce this Project Management Methodology for all City projects.

This Guidebook is designed to provide guidance and support to project managers, teams, and other participating parties throughout the life of the project.

Purpose

The primary purpose of this document is to describe the framework that is used by the City in initiating, planning, executing (managing), delivering, and closing projects. This document describes our Project Management Methodology and provides links to other documents, templates, and checklists that are used in support of this methodology.

This document is intended to provide a common point of reference for those charged with the responsibilities defined in the methodology. The roles and responsibilities of the Executive Sponsor, Steering Committee, Project Manager, Stakeholders, Subject Matter Experts and other team members that is integral to the success of any project.

This Guidebook was developed to put project management practices/knowledge into people's hands, without handing them a huge binder with ALL the details (such huge documents just don't get opened often enough).

It is designed to make the key elements of the process more visible and accessible to teams.

The “What, Why, and How”

Welcome to the Project Management Guidebook. This guidebook provides a practical approach to what many consider a complex process: the management of projects.

What:

This guidebook includes:

- Section 1: - A quick look at “The Basics” of Project Management.
- Section 2: - An overview of the City’s Project Management Methodology.
- Section 3: - A description of each Project Management Phases
- Section 4: - Key Project Roles and Responsibilities
- Section 5: - Project Management Checklists
- Section 6: - Appendix A – Technology Project Guidelines
- Section 7: - Appendix B – Additional Resources/Glossary

Why:

A standard process for project management practices will support all departments working on projects, by providing a framework and specific tools to efficiently and predictably reach project goals.

- Links projects to the goals and strategy of the department and the City.
- Fosters communication among team members and the rest of the city.
- Ensures efficiency, predictability, and the development of expected results as rapidly as possible.

How:

Departments should use this document in the management of:

- Large and/or complex projects
- Enterprise-wide projects

It is recommended that departments use this document as a guide in the management of:

- All projects, regardless of size

It defines a standard suite of:

- Terms
- Processes
- Knowledge areas
- Formats and templates to support effective project management

Underlined blue text refers to documents or templates which are available online.

Section 1: Project Management – The Basics

1.1 What is a Project?

"A project is a temporary endeavor undertaken to create a unique product, service, or result" PMBOK

Projects are

- unique (performs something specific)
The process to create your project is unique - this does not mean that any given project cannot have key similarities to other projects. A project creates unique deliverables – product, services, or results.
- have a defined timescale (temporary)
A specific start date and a specific end date. The end of the project is at the time where the project's objective has been met or when it has been determined that the objectives can not be met, or there is no longer a need for the project.

Projects are often utilized as a means of achieving an organization's strategic plan.

A project usually brings about change resulting in benefits to the organization.

Projects involve a group of inter-related activities that are planned and then executed in a certain sequence to create a unique product or service, within a specific time frame. A project is the result of progressive elaboration, this means you keep creating, modifying, and building upon your project in an organized way in order to meet the project's goal. The project manager and team learn more about a project and therefore can better manage it.

We generally categorize work performed in our organization as either project or operational work. Operational works are done to achieve business goals, whereas projects are executed to start new business objectives. Project Management is used to manage projects whereas business process or operations management is used to execute operations.

Difference between Projects and Operations are:

<u>Projects</u>	<u>Operations</u>
Temporary	Ongoing
Output – Unique	Output – Repetitive

Examples of projects include, but not limited to:

- Developing a new product or service
- Effecting a change in structure, staffing, or style of an organization
- Designing a new vehicle
- Developing or acquiring a new or modified information system
- Constructing a building or facility
- Building a water system
- Implementing a new business procedure or process

1.2 What is Project Management?

"Project management is the application of knowledge, skills, tools and techniques to project activities to meet project requirements." PMBOK

Project Management is a formalized and structured method of managing change. Project management ensures that everyone involved knows what is expected of them and helps to keep cost, time and scope under control.

"Project Management is comprised of skills, tools and management processes required to undertake a project successfully". Method123

There are two basic parts of project management.

Process – the coordination of a series of processes (initiating, planning, executing and controlling, delivering, and closing).

Objective – the management of those processes toward the achievement of the project goal.

Managing a project includes, but not limited to:

- Identifying requirements
- Establishing clear and achievable objectives
- Balancing competing demands for quality, scope, time and cost

1.3 Why do projects need to be managed?

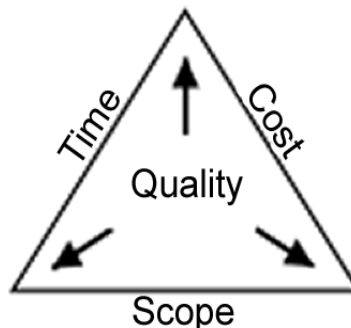
The purpose of initiating a project is to accomplish a specific goal. Project quality is affected by managing three important factors: project scope, time, and cost ("Triple constraint").

The organizing/managing of a project is the responsibility of an individual or group (project team) for the attainment of a specific goal/objective.

Management of the project involves, but not limited to:

- Coordination and integration of all activities needed to reach the project's goals.
- Response to the client and other stakeholders.
- Identify and correct problems at an early date.
- Make trade-off decisions (resources, time/schedule, and cost).
- Ensure individuals do not suboptimize.

Using project management techniques and processes will give you a higher likelihood that your project will be completed on time, within budget and at an acceptable level of quality.



1.4 What are the “key elements” in the management of projects?

No matter what the size and complexity of a project, consider the following key elements:

- Planning and scoping the project
- Organizational change management
- Stakeholder management
- Risk management
- Communication management
- Resource management
- Cost management
- Quality management
- Project status reporting
- Evaluation

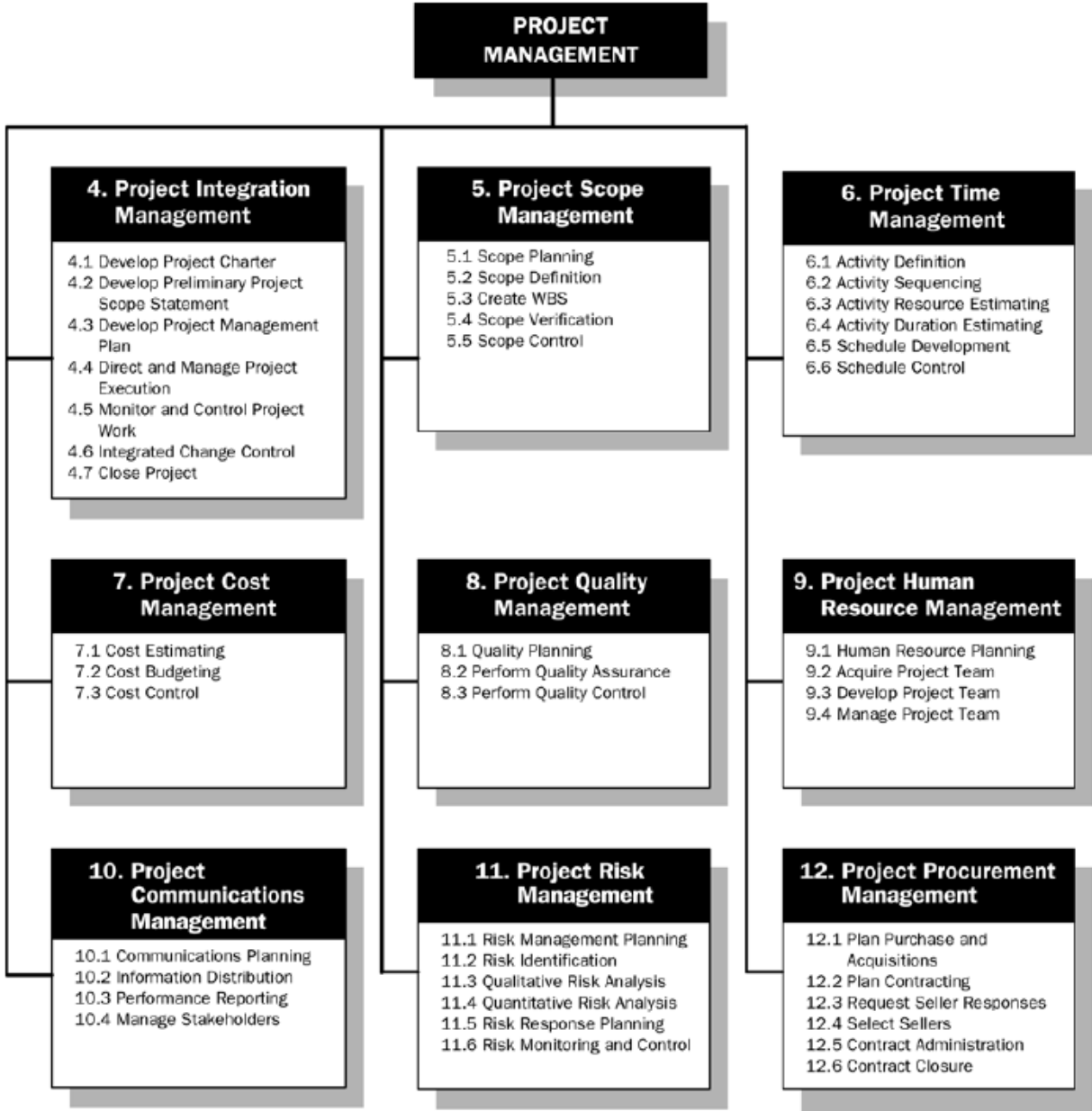


Figure 1-1. Overview of Project Management Knowledge Areas and Project Management Processes

A Guide to the Project Management Body of Knowledge (PMBOK Guide) Third Edition

1.5 What skills does a Project Manager need?

A sound knowledge of the principles and practices of project management:

Three important areas of the Project Manager's responsibility:

- Responsibility to the City of Tampa.
- Responsibility to the Project and the Client.
- Responsibility to the Project Team members.

Areas of knowledge needed by the Project Manager

- Understanding the project environment (cultural, physical and political environment).
- General management knowledge and skills (planning, organizing, staffing, and controlling the operations).
- Interpersonal skills (problem solving, leadership, effective communication, negotiation, and motivation).
- Application area knowledge (project management).

Responsibilities of the Project Manager (but not limited to):

- The project manager controls and monitors the "triple constraints" – Project scope, time, cost, and quality.
- Provide direction, leadership, and support to project team members in a professional manner at project, functional and task levels.
- Ensure project documentation is complete and communicated.
- Report project status and issues to the project sponsor, steering committee, and any other applicable stakeholders.
- Facilitate the prioritization of project requirements.
- Use, develop and improve upon the project management methodology within the organization.
- Resolve conflicts within the project between resources, schedules, etc.

The role of the Project Manager should be defined as early in the life of the project as is possible.

Contact the PML Group for further information on our Project Management training/education program.

Section 2: Project Management Methodology

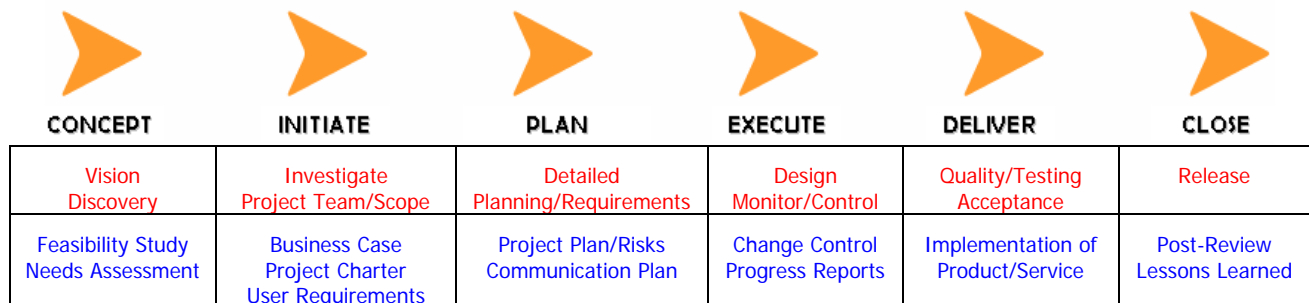
Our project management methodology/project life cycle provides an overall framework for managing projects of all types within the City of Tampa. This framework provides a basic structure for understanding project management. The project life cycle defines the phases that connect the beginning of a project to its end.

The transition from one phase to another within the project’s life cycle involves the transfer of deliverables. Deliverables from one phase are reviewed for completeness, accuracy and is approved before work starts on the next phase. It is not uncommon for one phase to begin prior to the approval of the previous phase’s deliverables (*fast tracking*).

The major elements of the framework are shown below:

- Projects are typically divided into **Phases** that define logical divisions of the project work over time. Phases also provide the team and management with “checkpoints” for reviewing the project progress and determining whether or not to continue with the project.
- The **Team Reviews**, shown in **red** letters, are important activities for the team. They are appropriate for all projects, from short feature enhancements to large system projects.
- The **signoff-deliverables** shown in **blue** letters provide management with checkpoints for assessing the project progress, issues, and approving the move to the next phase.

Figure 1. City of Tampa Project LifeCycle consists of six phases:



If a project idea requires technology it must be presented to the Information Technology Steering Committee (ITSC).

The ITSC is a group of individuals representing various departments within the City. They are responsible for the business issues associated with a project – ensuring the delivery of the project deliverables and the attainment of the project’s goals. This includes defining and realizing benefits - monitoring risks, quality and timelines - making resourcing decisions, and assessing request for changes to the scope of the project.

The steering committee will make recommendations regarding the approval for projects to the Governance Committee.

The project manager will normally attend meeting of the ITSC to speak to the project reports and answer any questions raised by members.

Section 3: Project Management Phases

3.1 Phase 1 – Concept (Getting Started)

Every project starts with an idea. The concept phase is where an opportunity has been identified. In this phase a feasibility study is conducted to decide whether or not to undertake the project. This is the first project phase. The objective of this phase is to explore or assess the need for a product or service in order to meet the business goals/objectives. By investing time up front, we can find and recommend to management the best overall solution. We can also ensure that we “Do It Right the First Time” by spending adequate time up front investigating alternatives and planning the rest of the project.

The driving forces that create the need for a project are typically referred to as problems, opportunities, or business requirements.

Project “Concept” - Critical Success Factors:

Why are we proposing to undertake this project?

- Evaluate the opportunity or need for a proposed product/service and decide whether to proceed further with it.

Examples: To provide services more efficiently/effectively, reduce the cost of operations, and/or generate more revenue.

- A champion leads a relatively small group through an exploration of a product/ service idea and the creation of a needs assessment/feasibility study.

A project manager may not have been selected; a project champion/leader should be assigned. The project champion may or may not be the eventual project manager. This project champion is responsible for defining the proposed project, gather background information, determine high-level planning and develop estimated budgets and schedules. The project champion will coordinate resources and the activities to complete the necessary components for the document.

- A principal deliverable of this phase is a preliminary needs assessment that supports further funding and staffing of the project.
- Establish the conceptual view and general definition for your proposed project.
- If your idea requires technology support, submit a “Change Proposal/Request” with the [T&I Self Service magic system](#).

Template: [Needs Assessment](#)

3.2 Phase 2 – Initiate (The Project)

The objective of this phase is to build upon the business needs assessment and develop a Project Charter/Business case with enough detail to make a go/no go decision. The Initiate process facilitates the formal authorization to start a new project. Before beginning this phase the organization/department's business needs or requirements are documented. The feasibility of this new undertaking has been established by evaluating alternatives to pick the best one. Clear descriptions of the project objectives are developed and the reasons why a specific project is the best alternative solution to satisfy the requirements.

The document presented during this phase contains a brief description of the project scope, deliverables, project duration and a forecast of resources required. This document is to represent/examine the strategic fit for the proposed project to the organization.

During the initiate stage an executive sponsor should be identified.

A high-level evaluation of the project's business case should include an evaluation of each implementation approach.

Projects will vary in terms of complexity, but all should have a Business Case or Project Charter. For some projects, it may take only a few hours or days to complete this document; for others, it could take months. This document is critical to guaranteeing buy-in for a project. The goal during this stage is not to generate a large document, but rather to provide information necessary to understand, and thus to determine, if the project should be initiated and carried into the Planning stage.

A good document not only justifies the investment of time, money and resources but also guides the project from analysis to implementation.

NOTE: The document focuses on the needed changes in the business process not on technology.

Project "Initiate" - Critical Success Factors:

- Identify an Executive Sponsor.

The sponsor is an executive responsible for the strategic direction of a project. An executive sponsor should have the authority to define project goals, secure resources, and resolve organizational and priority conflicts. There have been multiple cases that indicate a direct correlation between lack of project sponsorships and project failure. More on the role of an executive sponsor is covered under the "Key Project Role and Responsibility" section.

- Ensure you obtain senior managers' approval before you start the project. Get commitment and involvement from stakeholders.

The stakeholders are individuals/organizations that have a vested interest in what your project is doing. Input from the stakeholders help to define, clarify, and contribute to the success of the project. Key stakeholders on every project include (but not limited to): Project manager, customer/user, project team members, and sponsors. A challenge for the project manager is to manage the expectation of these stakeholders (with various interest), which will sometimes compete with each other.

- Focus on the needed changes in the business process and the people that will achieve the benefits rather than on technology. Focus on how the business will achieve changes related to both processes and people.
- Ensure your project aligns with the Department and City's strategic goals/objectives. If not, why do it?
- What measurable change should the project produce? Remember to include not only what the project will accomplish but also what it will not accomplish (*project scope*). Describe the proposed solution and the business process that will be used with the solution.
- Assess the probability of a particular solution achieving the benefits outline in the business case. Identify and quantify all potential benefits and how they will be measured and who will achieve the benefits.
- Carry out risk analysis at a high level at this stage. Avoid going into great detail here – provide an overview and focus on key risks.
- Decide who should be on your team - begin recruiting a project manager and project team members.
- Identify project constraints and assumptions.

All projects have constraints and assumptions. Projects may have limited resources, time, and money. Project assumptions need to be documented and defined before a project begins to ensure the time spent on project activities are utilized on areas of funding and support.

- Determine what resources you will need. If there are business/operational impacts, review and research the requirements that you will need with the other departments.
- Estimate the one-time development and acquisition costs, as well as the ongoing maintenance and operations cost expected to be associated with the project. This is the total cost of implementation and ownership over the life of the system. Explain how the proposed project is to be funded.
- Provide an implementation plan. Provide a schedule that includes duration of critical tasks, checkpoints and milestones.
- ITSC will review your Business Case/Project Charter and/or other documentation and decide whether or not to move your project to the next phase.

Everyone has a limited number of resources to perform tasks. Your department may have a committee established that act as the decision making authority regarding the direction of a project. For a project that includes technology services the Information Technology Steering Committee (ITSC) will review your documentation and decide whether or not to move the project to the next phase.

The Business case and/or Project Charter should be prepared at a level of detail appropriate for the complexity of the proposed solution. A small, less complex project would use a high-level business case within the Project Charter. On the other hand, a more costly and more critical project would require an expanded Business Case.

Template: [Business Case](#), [Project Charter](#)

3.3 Phase 3 - Plan (Defining your project)

The objective of this phase is to complete a detailed project plan and create a schedule to accomplish the project's intended goals and results. During this phase the project team participates in the planning process and continues to gather information from many sources. All team members are involved in this planning effort to ensure everyone's buy-in and commitment. For some, this is the most important phase in project management. Planning is an iterative and continuous process throughout the life of the project. The project plan is the source of information for how the project will be planned, executed, delivered, and closed. It is during this process that the project scope, cost and schedule of project activities are clearly identified and defined.

Purpose of the Planning phase:

Organize the work, obtain management approval, and provide a framework for management review and control. The project manager and project team is to determine which planning process/activities need to be done, the completion time, and by whom.

Project "Plan" - Critical Success Factors:

- Produce a written Project Definition/Project Plan and use it to inform stakeholders of the plan. This document is your "contract" to carry out the project and should be circulated to key stakeholders.

This document is the primary source of how the project is to be planned, executed (monitored), delivered, and closed.

- Assign a Project Manager.

A project manager is responsible for managing the project. A list of a project manager's responsibilities are described in the "Key Project Roles and Responsibility" section.

- Identify who the stakeholders are for your project – those affected and impacted by the project.
- Identify in detail what is and is not included in the project scope. Use the project scope statement to prevent "scope creep".

The project scope sets the overall guideline as to how the project will be defined, verified, and controlled. It establishes the project boundaries.

- Identify who fulfills which roles in your project. This is the group performing the work on the project. Analyze whether they have the skills required to enable them to carry out their role/responsibilities. In addition, verify that they are available for the period of the project.

Staffing the project is crucial in any project. Determining the required skills and efforts of your project will assist in determining who should be included in the project team.

- Determine early in the life of the project as to what is driving the project (objective). Discuss often with the sponsor the project's goal/objective and ensure it remains consistent throughout the project.
- Hold a kick off meeting/workshop with key stakeholders, sponsor(s), project manager and project team.

- Create a work breakdown structure (WBS) for the project. A WBS is a key element you will need to develop your plan. It lists all of the activities you will need to undertake to deliver the product/service.

The WBS provides the capability to break down the work to be performed into manageable activities and assign responsibility. The level of detail will vary depending on the size of the project. The WBS is a definition of what is to be delivered, who will deliver it and how it will be delivered. It is a planning tool that must be used to ensure project success of any size project.

Basic guidelines for developing a WBS:

Break down work activities until accurate estimates of resources/cost needed to perform the task are identified.

Clearly define starting and ending dates for the tasks and verify it can be completed within a reasonable period of time.

Verify that people assigned to the project are assigned to a WBS task.

- Identify the critical path for the project. The critical path identifies those activities which must be completed by the due date in order to complete the project on time.
- **Communicate, communicate, and communicate!** Delivering a project effectively means you need to spend time communicating with a wide range of individuals. Build a communication plan and review it regularly.
- Conduct Risk Assessment – carry out a full risk analysis and document it. Regularly review each risk to ensure you are managing them, rather than them managing you.

A risk is an occurrence that may affect the project for good or bad. In a project, risk assessment describes an impact of an event that could reduce the quality of the end product, increase cost, or delay completion. A risk is the recognition that a problem or an opportunity might occur. This is an assessment that recognizes the potential problems and documents ways to avoid or minimize these problems by performing specific actions.

- Develop a Gantt chart and use it to monitor progress against the plan.
- Develop milestones - these are stages in the project.

You can use the milestone dates to check the progress of the project. Use it to approve completion of a phase and make a go/no-go decision to proceed to the next phase or to continue the project. These checkpoints ensure deliverables will meet the project objectives within the accepted time frame.

- Determine other resource requirements, such as facility needs (workspace), equipment and material needs.
- Review project cost estimate and budget

At this phase determining the budget cost is associated with the activities involved, both the lengths of the task and resources assigned. Budgeting serves as a monitoring system where actual cost can be compared to the budget cost. This provides information to forecast whether a project is running over or under budget. When the project schedule is adjusted, the cost is proportionally affected. The project manager will need to revise to the project plan to determine whether cost, scope or scheduling needs to be modified.

Budget estimates should be established by those responsible for managing the work efforts. They provide the expertise required to make the estimate and perhaps present an opportunity to gather buy-in.

- Determine a process for scope change

Have a document that describes how project scope changes will be managed. Develop a process of identifying and documenting potential changes, then how to review and approve the change, and finally which areas in the planning document will need to be updated based on the changes integrated into the project.

- Develop a project deliverables repository

Throughout the life of the project there will be many reports and other key documents important to the project. Project team members should be able to easily find these documents. The project team should define the repository for project knowledge and the procedure of ensuring that documents are maintained.

- Develop an organizational change management

Some of this may not become apparent until the completion of the execute phase. This document describes (at a high level) the impact of the project on the organization. Develop a process of identifying potential organizational changes/impact. This may include a review of business process improvement opportunities, training needs, and determining the level of knowledge transfer.

- ITSC will review your Project Plan and/or other documentation and decide whether or not to move your project to the next phase.

Everyone has a limited number of resources to perform tasks. Your department may have a committee established that act as the decision making authority regarding the direction of a project. For a project that includes technology services the Information Technology Steering Committee (ITSC) will review your documentation and decide whether or not to move the project to the next phase.

NOTE: Without planning, a project's success will be difficult, if not impossible. Team members will have limited understanding of expectations; activities will be poorly defined and resource requirements will not be understood.

Template: [Communication Plan](#), [Project Plan](#)

3.4 Phase 4 – Execute (Project Control – Monitor and Review your Project)

The objective of this phase is to manage and coordinate the tasks, people and other resources defined in the project's plan to accomplish the project's objectives. The deliverables in the execute phase focus on managing change, entering task/schedule updates, tracking progress, and communicating project information. Each team performs defined tasks within the project to ensure their contribution to the project's success. It is during this phase that stakeholders, project team, vendors, sponsors and others will expect to see and discuss the resulting deliverables that were detailed in the project's plan.

Managing the project's plan ensures that project activities are carried out in an effective and efficient manner. During this phase more attention is given to interested parties to keep them up to date with project status, issues, quality control, and risks.

Project control involves reviewing metrics and status reports in order to identify variances from the project's planned baseline. The variances are determined by comparing the actual against the planned baseline. Such variances may or may not affect the project, but may require an analysis and adjustments to be made (part of the plan-do-check-act cycle - *PMBOK*).

Project "Execute" - Critical Success Factors:

- Monitor and control the project work. Have a clear project management monitor and review process. Collect information and be aware early in the project about what will be monitored, how it will be monitored and the frequency. Keep accurate records (document management) of your project not only for audit purposes but to ensure you have documents which enable you to monitor changes.
- Agree to a system for project changes – have an agreed system for monitoring and approving changes. Use a change control form and obtain formal sign off (agreement) by the sponsor, *before* making a change. Look for the impact(s) of the change on the project scope.
- Manage the project schedule, collect and validate the schedule information with the Work Breakdown Structure (WBS). Schedule control is perhaps the most difficult but important activities with monitoring the project.

It is very important to make the customer, stakeholders, sponsors, and all other affected project participants aware that a schedule change has occurred. In addition, an explanation of what is being done to fix the issue and the impact(s) on the project should be clearly communicated.

- Manage project cost. Monitoring variances on the project's budget must be done on a regular basis.
- Set up project meetings to review the project's progress. Have an agenda with times against each item and summarize the discussions after each item at the end of the meeting.

These meetings provide opportunities to discuss important issues with input from several sources.

The project status meeting is a forum for the project manager to communicate the progress and status of the project with the team and to implement project direction.

The executive sponsor status meeting is a venue for the project manager to discuss the status of the project and any key issues. Typically, these meetings are conducted once a month.

The Steering Committee status meeting is a forum for the committee to evaluate the overall progress of the project. The committee ensures the project is progressing satisfactorily by

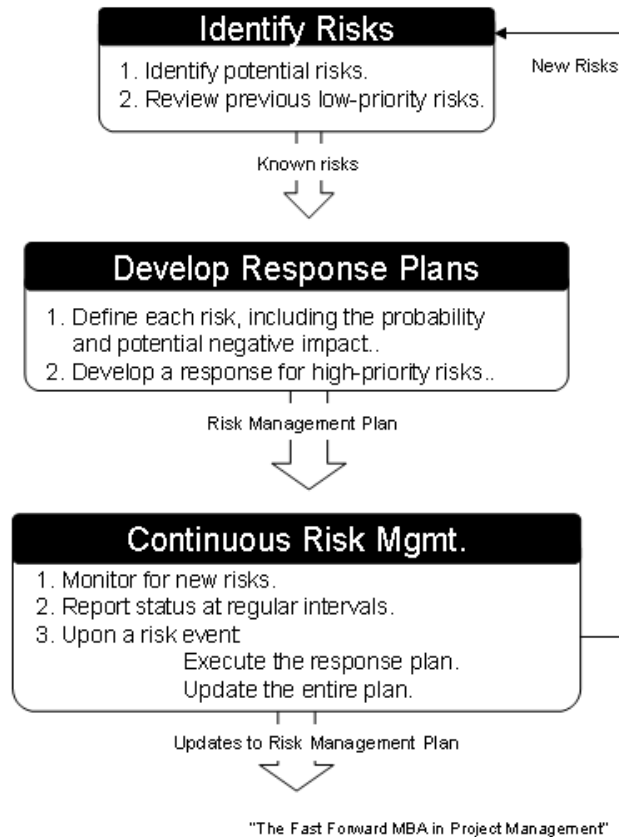
reviewing the project phase/checkpoints or milestones. This method provides information to determine whether or not to approve (go/no-go decision) the completion of a phase and proceed with the project. Typically, these meetings are conducted once a month.

Again, for a project that includes technology services the Information Technology Steering Committee (ITSC) will review your documentation and decide whether or not to move the project to the next phase.

- Produce meeting minutes and action items against each item on the agenda and circulate within a specified timeframe after the meeting.
- Review the items on the critical path and make sure they are on schedule. Review risks and whether or not you are still on track to deliver on time, in budget and at the required performance.

Complete a risk assessment and have a risk management plan.

Risk Management Framework



- Develop an issues log to record items that may be causing concern. Review the issues log at your project meetings. This provides a method of maintaining and tracking the resolution of issues.
- Establish a procurement plan. This documents the process of purchasing or acquiring products, services outside the project team that are needed to deliver the product/service. In this document are the guidelines/policy for product and/or service selection and contract administration.

- Manage the contractors/vendors. The project manager is responsible for ensuring vendors do the work and meet the contract agreements. Project managers are responsible for tracking and reviewing the performance of the contractors on the project. The project manager must review and communicate any contract changes that will affect the project.
- Do not be afraid of abandoning a project. Better to abandon now rather than waste valuable time, money, and resources working on something that is no longer required. If you close a project early – hold a project review meeting to identify lessons learned.
- Apply a “Dashboard” to illustrate how you are progressing – red, yellow and green. You can use these in conjunction with milestone reports.
- ITSC will review your Project Status report and/or other documentation and decide whether or not to move your project to the next phase.

Everyone has a limited number of resources to perform tasks. Your organization may have a committee established that act as the decision making authority regarding the direction of a project. For a project that includes technology services the Information Technology Steering Committee (ITSC) will review your documentation and decide whether or not to move the project to the next phase.

Template: [Meeting Agenda](#), [Meeting Minutes](#), [Project Status Report](#)

3.5 Phase 5 - Deliver (Tangible and In-tangible deliverables)

The objective of this phase is to deliver the actual product or service to the customer. The key element within the deliver phase is gaining customer acceptance of the project and ensuring that all project requirements have been satisfied.

Project "Deliver" - Critical Success Factors:

- Review the results to ensure that all required items for delivery have been met.
- The implementation process includes specific details regarding the installation and training of the product/service, roles and responsibilities, implementation schedules, training schedules, and (if applicable) hardware/software/facility preparation pre-requisites.
- Create training materials to facilitate the training of your users.
- Establish a final acceptance process.

It is important for the end user and the developer to agree on the product/service. In some cases, users may be required to 'sign off' on an acceptance report/form.

- The acceptance testing phase is critical for IT projects and requires significant participation by the 'end users'.

Template: [User Acceptance](#)

3.6 Phase 6 - Close (Closedown and Review)

The objective of this phase is to formally close the project, release staff and equipment, and inform stakeholders of the closure of the project. This is the last phase of the project's life cycle. Project closeout is completed once all defined project tasks and milestones have been completed and the customer has accepted the project's deliverables.

Project "Close" - Critical Success Factors:

- Create a Project Closure Report, list every activity required to close the project.
This may include a formal acceptance by the end-user, stakeholders and steering committee, at least those who signed the project plan. Reassign resources, such as staff, equipment or other systems.
- Document "lessons learned".
- Conduct a final acceptance meeting.
Resolve any final project details and obtain customer acceptance of the final deliverables. Check whether your project has delivered within budget, fulfilled performance requirements and within the specified timeframe. Invite all the necessary stakeholders (avoid open issues on individual basis) to review the product/service delivered against the baseline requirements.
- Understand how well you managed risks and communicated with stakeholders, use questionnaires to obtain feedback.
- Prepare a list of unfinished items and/or future action plans. Identify who will complete these after the project and circulate to any stakeholders.

- Conduct a final contract review.

This is the process of terminating contracts that are outside the project team. These could be vendors, consultants, or the services and/or equipment used during the project.

- Establish a knowledge transfer process.

This includes all documentation that has anything to do with the project. The project information should be archived and provided as an important source of information to improve future projects.

Items to include (but not limited to):

1. Project Business Case or Project Charter
2. Project Plan, including communication plan, risk assessment, and etc
3. Meeting notes, including meeting agenda and meeting minutes
4. Status Reports
5. Technical documents
6. Other documents/information

- Between one and three months after the project has closed and the business has begun to experience the benefits provided by the product/service, you should complete a Post Implementation Review.

This review allows the business to identify the level of success of the project and list any lessons learned for future projects. Invite key stakeholders, sponsor(s), and project team members to the post project review.

Focus your meeting on learning – identify what you can use on the next project.

- Share the lessons learned with others in the City.
- **Celebrate success with your team!** Recognize achievement - there is nothing more motivating!
- ITSC will review your Close out report and/or other documentation.

Everyone has a limited number of resources to perform tasks. Your organization may have a committee established that act as the decision making authority regarding the direction of a project. For a project that includes technology services the Information Technology Steering Committee (ITSC) will review your documentation.

Template: [Closeout Report](#)

Section 4: Key Project Roles and Responsibilities

The roles and responsibility of the project need to be determined for each project or type of project. Defining project roles and responsibilities provides a clear understanding of the expectations, authority, and responsibilities necessary for a successful completion of project activities.

Project Roles are defined as follows:

4.1 Stakeholder

These are specific people or groups who have a vested interest in the outcome of the project. These are the groups, units, individuals, internal or external to our organization which are impacted by or can be impact by the results of the project. This includes (but not limited to) the Project Team, Sponsors, Steering Committee, and Customers.

4.2 Steering Committee

The Steering Committee provides guidance, strategic direction, approvals and decisions that affect the project progress. They are to ensure sufficient resources are available to conduct projects. The Steering Committee usually includes management representatives involved in project oversight.

The IT Steering Committee is responsible for ensuring technology projects are consistent with the City's strategic objective.

4.3 Executive Sponsor

The Executive Sponsor provides clarity of the project vision and strategic direction for the project. They have ultimate authority over the project and direct the activities of the project team. They are responsible for allocating funding and resources to the project, resolve issues and scope changes, and approve major deliverables. They also champion the project within their department/organization. The Executive Sponsor provides support to the Project Manager and signs off on approvals to proceed to each project phase. They are ultimately responsible for the project success and therefore the ultimate decision-maker for the project.

4.4 Project Manager

The person assigned by the department/organization to achieve the project objectives. The project manager oversees the coordination of activities across multiple functional lines. They are responsible for managing the project scope, time, cost, and quality. The project manager leads and manages the project team. The project manager applies project management, negotiation, and understanding of the organization environment to meet the project goals and objectives.

4.5 Project Team

This is a group of individuals assigned to work on the deliverables of the project.

The project team participates in the project planning process, buys into the project and is responsible for the completion of assignments. They are responsible for executing tasks and producing deliverables as outlined in the project plan.

The project team may include the subject matter experts responsible for implementing the project solution. Customers should interact with the project team to ensure requirements are properly understood and implemented.

4.6 Business Analyst

This person(s) with in-depth knowledge of the department's/organization overall business processes. They are responsible in identifying and documenting the business needs and translate them into a set of requirements to assist in scoping the project. This individual(s) usually assist in the testing and development of the product/service.

4.7 Change Control Board

This is usually made of a group of decision makers authorized to accept changes to the project requirements, budget, and time of completion. This group is responsible for reviewing the changes against possible impacts to other functional areas.

4.8 The Client

The "customer/user" that receives the business benefit of the project. They are the reason the project is being undertaken and are usually involved in defining the business need and requirements.

General Tips

- Get trained! Refer to the City of Tampa Project Management Training Program or contact the Project Management League (PML) for more information. Learn about project team member's roles and responsibilities.
- Ensure you have the buy-in of senior management for your project. You will need to work hard to influence upwards and get their support.
- What about the day job? Projects get in the way and the day job gets in the way of projects! Many people have found that by applying project based working to day to day activities and by being more rigorous on project work, *more* is achieved.
- Identify early on in the life of the project, the priority of your projects. Inevitably, there will be a clash with another project(s) or another task(s).

Good luck in delivering your project!

Section 5: Project Management Checklist

Use the Project Management checklist to decide on which project activities and deliverables the team needs to complete during the project.

When a deliverable is under consideration for removal from the project plan, the Project Manager should ask the following questions:

- Does the deliverable state basic project goals that need to be clearly understood across one or more functional groups?
- Does the deliverable lower the risk of missing any of the project's goals?
- Can the deliverable remain in the project in a reduced form appropriate to the scope of the project?
- Will the information captured in the deliverable be needed during the course of the project, or possibly after development, or during the life-cycle of the product or service?

Keep in mind the purpose of the activities/deliverables and use those that will provide the most value to the project.

Template: [Project Management Checklist](#)

Section 6: Appendix A

5.1 Technology and Innovation – Additional Guidelines

Phase 1: Concept

Phase 2: Initiate

Phase 3: Plan

Phase 4: Execute

Phase 5: Deliver

Phase 6: Close

Section 7: Appendix B – Additional Resources

If you've completed the steps described in the guidelines, you will find yourself delivering more projects on time, within budget and with the expected results.

To get the most out of those templates – Go to “Project Management Program” located on the [Enterprise Change Management iNET](#) page. The templates describe how to complete each step in the project life cycle.

In addition, you will find information on the project management training/education program, mentoring/coaching program, other tools/resources, and the reward/recognition program. It's about knowledge sharing!

The Project Management Program is set up to save you time and money.

- Templates – developing the deliverables for your projects (just open the templates and fill in the gaps)
- Plans – establish schedules and task items
- Forms/Reports – for communication and monitoring project activities
- Charts/Diagrams – to control project change
- Procedures – to improve quality
- Checklist – to measure success

7.1 Glossary of Terms (based on PMBOK)

Acceptance Criteria – those criteria, including performance requirements and essential conditions, which must be met before project deliverables are accepted.

Actual Cost – total costs actually incurred and recorded in accomplishing work performed for a schedule activity or work breakdown structure component.

Assumptions – for planning purposes, are considered to be true, real or certain without proof or demonstration. Project teams frequently identify, document, and validate assumptions as part of their planning process. Assumptions generally involve a degree of risk.

Business Case – a document outlining the justification for the initiation of a project.

Budget – The approved estimate for the project.

Change Control – identifying, documenting, approving or rejecting, and controlling changes to the project baselines.

Change Request – requests to expand or reduce the project scope, modify policies, processes, plans, or procedures, modify costs or budgets, or revise schedules. Requests for a change can be direct or indirect, externally or internally initiated, and legally or contractually mandated or optional. Only formally documented requested changes are processed and only approved change requests are implemented.

Checklist – items listed together for convenience of comparison, or to ensure the actions associated with them are managed appropriately and not forgotten.

Close project - the process of finalizing all activities across all of the project process groups to formally close the project.

Communication Plan – the document that describes: the communication needs and expectations for the project, how and in what format information will be communicated; when and where each communication will be made; and who is responsible for providing each type of communication.

Cost estimating – the process of developing an approximation of the cost of the resources needed to complete project activities.

Critical Path – generally, the longest path through the project, the sequence of schedule activities that determines the duration of the project.

Customer – the person or organization that will use the project's product or service or result.

Deliverable – a measurable unique and verifiable product, result, or capability to perform a service that must be produced to complete a process, phase, or project. Such as a specification, feasibility study report, detailed design document, or working prototype.

Estimate – a quantitative assessment of the likely amount or outcome.

Execute – directing, managing, performing, and accomplishing the project work, providing deliverables, and providing work performance information.

Funds – a supply of money or pecuniary resources immediately available.

Initiating processes – Those processes performed to authorize and define the scope of a new phase or project or that can result in the continuation of halted project work.

Issue – a point or matter in question or in dispute, or a point or matter that is not settled and is under discussion or over which there are opposing views or disagreements.

Lessons learned -The learning gained from the process of performing the project.

Level of Effort – generally characterized by a uniform rate of work performance over a period of time determined by the activities supported.

Methodology – a system of practices, techniques, procedures, and rules used by those who work in discipline.

Milestone – a significant point or event in the project.

Monitor – collect project performance data with respect to a plan, produce performance measures, and report performance information.

Planning Processes – processes performed to define and mature the project scope, develop the project management plan, and identify and schedule the project activities that occur within the project.

Portfolio – a collection of projects or programs and other work that are grouped together to facilitate effective management of that work to meet strategic business objectives.

Process – a set of interrelated actions and activities performed to achieve a specified set of products, results, or services.

Project – a temporary endeavor undertaken to create a unique product, service, or result.

Project Charter – a document issued by the project initiator or sponsor that formally authorizes the existence of a project, and provides the project manager with the authority to apply organizational resources to project activities.

Project Life Cycle – a collection of generally sequential project phases whose name and number are determined by the control needs of the organization or organizations involved in the project.

Project Management – the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

Project Management Body of Knowledge – an inclusive term that describes the sum of knowledge within the profession of project management. The complete project management body of knowledge includes proven traditional practices that are widely applied and innovative practices that are emerging in the profession.

Project Management Office – an organizational body or entity assigned various responsibilities related to the centralized and coordinated management of those projects under its domain.

Project Management Plan – a formal, approved document that defines how the project is executed, monitored and controlled.

Project Management Software – a class of computer software applications specifically designed to aid the project management team with planning, monitoring, and controlling the project.

Project Manager – the person assigned by the performing organization to achieve the project objective.

Project Phase – a collection of logically related project activities, usually culminating in the completion of a major deliverable. Phases are mainly completed sequentially, but can overlap in some project situations.

Project Scope – the work that must be performed to deliver a product, service, or result with the specified features and functions.

Project Scope Statement – the narrative description of the project scope, including major deliverables, project objectives, project assumptions, project constraints, and a statement of work, that provides a documented basis for making future project decisions and for confirming or developing a common understanding of project scope among the stakeholders. – What needs to be accomplished.

Project Team – all the project team members, including the project management team, the project manager, and for some projects, the project sponsor.

Project Team Members – the persons who report either directly or indirectly to the project manager, and who are responsible for performing project work as a regular part of their assigned duties.

Quality Planning – the process of identifying which quality standards are relevant to the project and determining how to satisfy them.

Requirement – a condition or capability that must be met or possessed by a system, product, service, result, or component to satisfy a contract, standard, or specification.

Resource – skilled human resources, equipment, services, supplies, or funds.

Risk – an uncertain event or condition that, if it occurs has a positive or negative effect on a project's objectives.

Risk Management Plan – the document describing how project risk management will be structured and performed on the project.

Scope – the sum of the products, services, and results to be provided as a project.

Scope Change – any change to the project scope. A scope change almost requires an adjustment to the project cost or schedule.

Scope Creep – adding features and functionality without addressing the effects on time, costs, and resources, or without customer approval.

Sponsor – the person or group who provides the financial resources for the project.

Stakeholder – person or organization that is actively involved in the project, or who interest may be positively or negatively affected by execution or completion of the project. A stakeholder may also exert influence over the project and its deliverable.

Template – a partially complete document in a predefined format that provides a defined structure for collecting, organizing and presenting information and data. Templates can reduce the effort needed to perform work and increase the consistency of results.

User – the person or organization that will use the project's product or service.

Work Breakdown Structure – The process of subdividing the major project deliverables and project work into smaller, more manageable components. A decomposition of the work to be executed by the project team to accomplish project objectives and create required deliverables.

** An extensive glossary will be available on the "City of Tampa Project Management Guidebook"

All projects must be defined in terms of Time, Budget, and Performance. This is commonly referred to as the 'Triple Constraints'. The one constraint that has the highest priority becomes the driver of the project.

Triple Constraint



Mental Checklist

1. Set a clear project goal – Begin with the end in mind
2. Determine project objectives
3. Establish checkpoints – Milestones and time estimates
4. Have a Project Schedule – MS Project
5. Direct people individually and as a project team
6. Keep everyone communicated on the project

5 Project Success Factors (*Fast Forward MBA in Project Management*)

1. Agreement among the project team, customer, and management on the goals of the project.
2. A plan that shows an overall path and clear responsibilities and will be used to measure progress during the project.
3. Constant, effective communication among everyone involved in the project.
4. A controlled scope.
5. Management support.

7.2 Acknowledgments

In development of this guidebook, the City of Tampa Project Management League have based most of its content on the principles and practices by the Project Management Institute (PMI®). Disclaimer: PMI® did not participate in the development of this guidebook.

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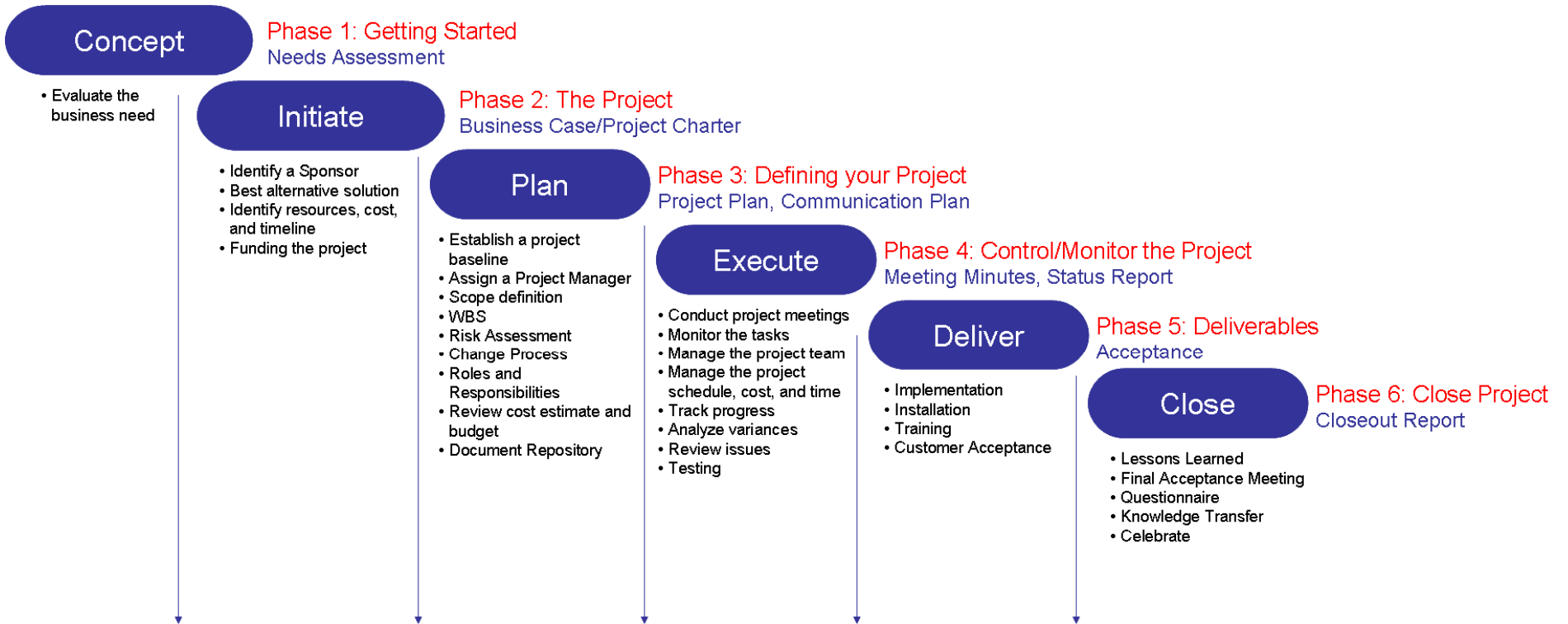
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Quick Reference Guide



Checkpoints – Approval Process