THE PROJECT MANAGEMENT FRAMEWORK

GEORGE MASON UNIVERSITY®

Enterprise Project Management Office

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Contacts and Document Control

Contact Information

- Enterprise Strategic Governance
- Enterprise Project Management Office
- Enterprise Business Analysis

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Document Control

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Introduction

The Project Management Framework is a methodology that references industry standards to identify, classify, document, and manage all types of projects across the university. The goals of this Framework are:

1. To inform Enterprise Project Managers and partners of the Project Management Framework Lifecycle (PMFL) in use at GMU and how to apply it to manage their projects in a standardized, repeatable manner.
2. To provide a set of Project Management templates and tools that can be used by project teams to plan and execute projects.
3. To provide management controls through data collection and approvals to satisfy regulatory and audit requirements.
4. To support Portfolio Management and Domain Council processes.

Project managers should employ this Framework as an integral part of the workflow for all project team members and activities. To ensure continuous improvement and reliability of the Framework, it is crucial that project managers (and team members) enter and update project information regularly. The Framework provides tools and guidance.

While the PM Framework provides templates and tools, successful project management is primarily about the data and information collected and used throughout the project's lifecycle. There are multiple ways to capture and document required project management information. The templates provided ensure that relevant information is captured and reported in a timely manner.

The Framework is designed to ensure:

- **Clarity** – Requirements, Scope, Success Criteria, Roles & Responsibilities
- **Alignment** – Continuity Between Phases, Realized Business Value
- **Traceability** – Acceptance, Current Autonomy Level, Government Reporting Requirements
- **Effective Resource Utilization** – Level of Effort, Tracking, Planned vs. Actual

The PMFL is intended to be used for ALL Projects at George Mason University and is supported and maintained by the Enterprise Project Management Office (EPMO). Full details of the PMFL, templates, and additional information are available on the EPMO's website, https://ofeg.gmu.edu/project-management/.

Definition of an EPMO Project

The Project Management Institute (PMI) defines a **project** as "a temporary endeavor undertaken to create a unique product, service, or result." In other words, a project is a sequence of tasks bounded by time, resources, and required results; has a defined outcome and deliverables; has a deadline; and has a budget limiting the number of people, supplies, and capital.

At George Mason University, the Enterprise Project Management Office (EPMO) recognizes this same definition for all **projects**. While this Framework can be applied to manage all types of projects, including ITS efforts, non-technical and capital projects. Within this document, the term "project" refers to an EPMO Project.

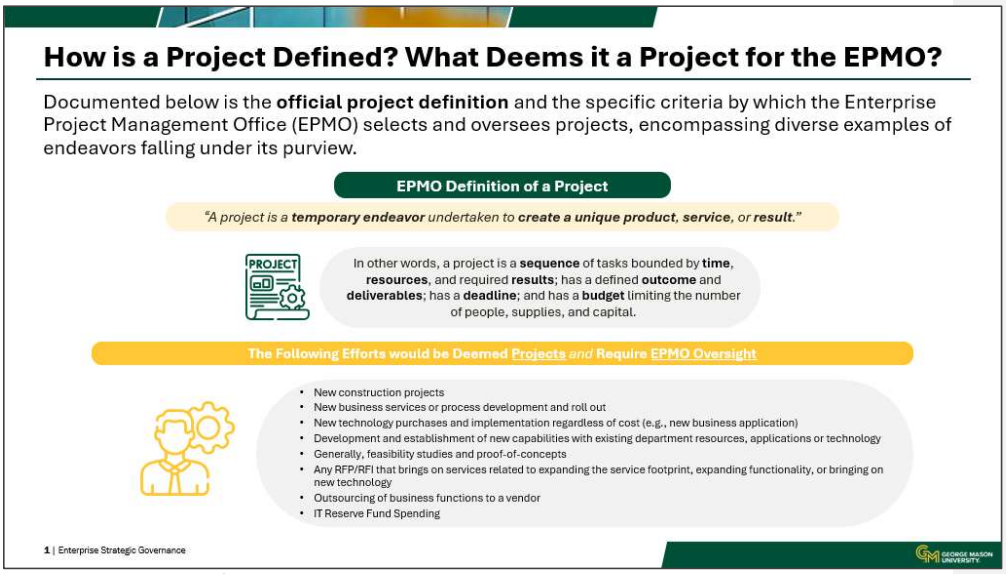


Figure 1 - What is a Project?

While this definition is straightforward, complexities and questions exist, particularly within the context of a local environment. Some of the following attributes may assist in the definition of an EPMO Project. The Project Management Body of Knowledge (PMBOK©), states that managing a project includes the following:

- Identifying the business issues and risks to be addressed by the project
- Establishing clear and achievable objectives
- Adapting to different concerns and expectations of partners
- Clarifying/identifying requirements
- Balancing competing demands for quality, scope, resources, time, and cost

The following key project characteristics are essential for achieving project objectives efficiently and effectively:

- Shared resources are often only available on a part-time basis
- Cross-functional teamwork may be required
- Uncertainty and potential change during execution
- Changes to the way the business operates
- Specific deadlines, time and resource constraints

To further assist in the project definition, included below are diverse examples of endeavors falling under the EPMO's oversight.

- New technology purchases and implementation regardless of cost (e.g., new business application)
- Development and establishment of new IT service offerings (e.g., ITSM/ITAM, CRM, Cisco telephony)
- Development and establishment of new capabilities with existing on-site applications or technology
- Generally, feasibility studies and proof-of-concepts
- Any RFP/RFI that brings on services related to expanding the technology footprint, expanding functionality, or bringing on new technology
- Outsourcing business functions to a vendor that includes IT systems
- IT Reserve Fund Spending
- Process optimization and redesign efforts
- Technology/AV components of Facilities construction projects
- New business services or process development and rollout

Within Appendix 1, please find efforts that are not considered EPMO projects and do not meet the criteria. Projects that do not meet the EPMO's criteria will not fall under the EPMO's oversight, nor will they be staffed by the EPMO's Enterprise Project Managers. Managers managing these initiatives, however, are encouraged to leverage the PM Framework for their projects.

This Framework provides a means of answering questions within George Mason University's environment by using local definitions when most appropriate. At the same time, when necessary to do so, it aligns and complies with the policies, procedures, and requirements of external agencies.

Project Roles and Responsibilities

The first component of the Project Management Framework establishes the roles and responsibilities of persons participating in the project development processes. Project roles and responsibilities are introduced below.

Project Sponsor

The Project Sponsor is the individual within George Mason University who makes the business case for the project. This individual (or the sponsor along with a Project Steering Committee) has the authority to define project goals, secure resources, and resolve conflicts. The sponsor oversees the project and provides guidance, direction, oversight, and political support to the project manager and the project team. He or she approves the project proposal and project

charter and provides the formal sign-off for acceptance of a project's final deliverable(s). For ITS projects, sponsors must be at the director level or higher.

Project Steering Committee

The Project Steering Committee is advisory in nature and provides recommendations to the project sponsor and university leadership regarding project initiation or continuance, management, baselines (e.g., performance, cost, and schedule), periodic reviews, and any additional follow-up actions required to ensure the success of the project. Depending on the nature of the project, the committee may also be involved in charter and objective approval and deliverable acceptance. Steering Committees are usually part of large, enterprise-wide projects that impact many groups around GMU. They can be a crucial part of project governance. Though not all projects will need a steering committee, they are highly encouraged based on each project's complexity, cost, scope, and impact.

Project Owner

A GMU Project, regardless of which department initiates it, is assigned a Service Owner, especially if it has a technical component. The Enterprise Project Owner coordinates the project by securing necessary resources, monitoring the project's progress relative to other projects in the Information Technology Portfolio. The Enterprise Project Owner also serves as an escalation path for the project sponsor when needed. As with the Project Sponsor, the Enterprise Project Owner must be at the director level or higher. For projects originating within ITS, the same person may act as both the Project Sponsor and the Enterprise Project Owner.

Project Manager

The Enterprise Project Manager, assigned by the project sponsor and/or the EPMO, is responsible for managing and completing the project on behalf of the sponsor and George Mason University. Approval of the project charter grants authority to the project manager to staff the project team, procure resources, and utilize the systems necessary to complete the project objectives. Certain projects require that project managers be either Virginia Information Technologies Agency (VITA) qualified[1] or Project Management Institute (PMI) Project Management Professional (PMP) certified[2]. Based on the type of project, there may be two types of project manager roles assigned:

- **Enterprise Project Manager** – This person is a project manager from the EPMO organization. The PM coordinates all project lifecycle activity requirements and coordinates the efforts of the project team.
- **Additional Project Manager** – an additional PM is someone from the organization requesting the project or a supporting department who is responsible for coordinating tasks, resources and responsibilities of the functional office initiating the project. The additional PM works directly with the Enterprise Project Manager to deliver the project.

[1] http://www.vita.virginia.gov/it-governance/project-management/

[2] https://www.pmi.org/certifications/types/project-management-pmp

Business Analyst (BA)

The OFEG Enterprise Business Analysis (EBA) team's primary focus is to provide support, management, and coordination for the entire Intake Request process, from ticket submittal, through charter creation and project approval. This role includes coordinating the analysis, evaluation, and decision-making process for requests related to the implementation of new technology or significant architectural modifications. The EBA team works in collaboration with the requesting functional office to facilitate this process. Further details on the Submission and the Intake Request Process are detailed in the Project Management Framework Lifecycle: Intake.

- Enterprise Business Analyst
- Additional Business Analyst

Overall, the Enterprise Business Analyst acts as a liaison between the requesting functional office and the EPMO, ensuring that all project requests, whether for new technology, new business process definition or significant technical architectural modifications are thoroughly analyzed, evaluated, and aligned with the organization's priorities. EBAs bring their expertise in business analysis to facilitate a consistent and transparent process, promoting equity among partners and enabling informed decision-making.

Stakeholders

Stakeholders are persons and organizations (e.g., customers, sponsors, performing organizations, and other stakeholders) actively involved in the project, or whose interests may be affected positively or negatively by execution and/or completion of the project. Typical partners for most projects at George Mason University include academic departments, administrative units, the greater university community, and the Commonwealth of Virginia, as well as the customer who provided the impetus for the project. Partners will vary by project. The Project Sponsor and Enterprise Project Manager must identify partners at the forefront of the project.

Users

In the context of a project, users comprise a special group of partners who will be the end- users of the system or service developed by the project. During the project, they may be involved in design and testing activities. Working on projects that affect the entire university community can pose challenges to scheduling, communication, and receipt of input. Given the nature of the academic calendar and certain groups' limited availability, project managers should consider how to appropriately engage various user groups throughout the project's lifecycle.

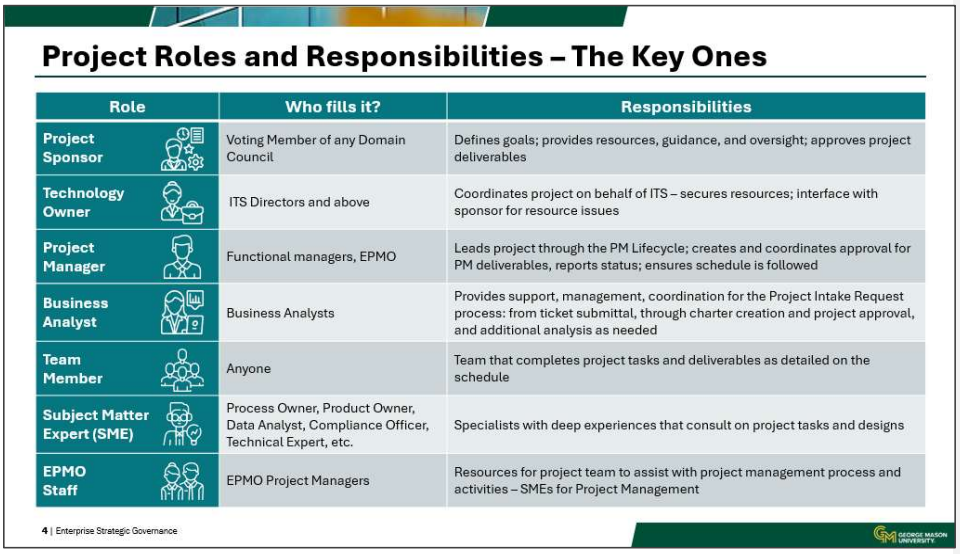
Project Team

The Project Team is composed of individuals that report, typically indirectly (i.e., dotted line report), either part-time or full-time to the project manager for the duration of the project and are responsible for performing project tasks. Within a project team there are specific roles including, but not limited to, the following:

- **Project Team Leaders** – Project teams may be divided into various functional or logistical sub-teams. Project Team Leaders are staff members responsible for leading sub-teams and coordinating activities with the project manager. For larger projects, the project manager may have a Project Leadership Team or Project Coordination Team.

This team consists of project team leaders and the project manager for the purpose of coordinating activities.

- **Subject Matter Experts (SMEs)** – Subject Matter Experts are individuals retained on a project due to their high level of knowledge, experience or specialized training. An SME can be either internal or external to the organization and serves a project team as an expert on a system, application, or in a specific functional area. Examples include Data Analyst, Information Technology Security Office (ITSO) representatives, Risk Analyst, Compliance Analyst, Health Specialist, etc.
- **Operations Staff** – Representative(s) of an operations staff serve as members of a project team to help ensure that the deliverable(s) of the project can be transitioned into ongoing operations.
- **Customer Representative** – Customer representatives serve as members of a project team to provide clarification on project requirements.
- **Vendors** – Project leaders, with the approval of the sponsor, may bring vendors to provide specialized skill sets to a project team.
- **Business Analyst -** A Business Analyst plays a critical role in bridging the gap between business objectives and technical solutions. The BA aims to strengthen collaboration, streamline processes, and ensure successful implementation of projects.



Project Roles and Responsibilities – The Key Ones

Role	Who fills it?	Responsibilities
Project Sponsor	Voting Member of any Domain Council	Defines goals; provides resources, guidance, and oversight; approves project deliverables
Technology Owner	ITS Directors and above	Coordinates project on behalf of ITS – secures resources; interface with sponsor for resource issues
Project Manager	Functional managers, EPMO	Leads project through the PM Lifecycle; creates and coordinates approval for PM deliverables, reports status; ensures schedule is followed
Business Analyst	Business Analysts	Provides support, management, coordination for the Project Intake Request process: from ticket submittal, through charter creation and project approval, and additional analysis as needed
Team Member	Anyone	Team that completes project tasks and deliverables as detailed on the schedule
Subject Matter Expert (SME)	Process Owner, Product Owner, Data Analyst, Compliance Officer, Technical Expert, etc.	Specialists with deep experiences that consult on project tasks and designs
EPMO Staff	EPMO Project Managers	Resources for project team to assist with project management process and activities – SMEs for Project Management

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Figure 2 - Project Roles & Responsibilities

Enterprise Project Management Office

The Enterprise Project Management Office (EPMO) supports consistent project management practices for project teams, enabling project leaders to deliver the value promised to customers. It provides project managers for selected projects, conducts project management training, and assists with project documentation, project management tools, and communication between various projects and project teams. The EPMO oversees the Project Management Framework to ensure it remains current and aligns with the structure of the organization. It also oversees the project management online tools and EPMO website which support the Framework.

Additional Project Definitions

To ensure consistency and alignment around each project, there are more definitions that Enterprise Project Managers need to be familiar with. The following include Request Type, the EPMO's Role, and Project Size.

Request Type

There are three request types that are defined through this Framework. Explore the definitions for the various request types, including Project, Operational & Technical Efforts, and Program, along with shared examples and guidance on the appropriate project management ownership, all presented below.

- **Project (PRJ)** – A temporary endeavor undertaken to create a unique product, service, or result; the purpose is to attain its objective and then terminate.
- **Operational Effort (OE)** – Support of an ongoing operation that sustains the business; involves permanent or semi-permanent functional work to repetitively produce the same product or service.
- **Program (PGM)** – A collection of related projects that may span multiple departments and/or impact the GMU enterprise.

Definition of Request Type

Type	Definition	Examples	Project Management Ownership
Project (PRJ)	A **temporary endeavor** undertaken to create a **unique product, service**, or **result;** the purpose is to attain its objective and then terminate. Can have a multitude of requests	• New Activities Building • LSEB Construction • Learning Management System (Canvas) Implementation • Position Management & Applicant Tracking System	EPMO or Domain / Department
Operational Effort (OE)	Support of an **ongoing operation** that **sustains the business**; involves permanent or semi-permanent functional work to repetitively produce the same product or service.	• Re-accreditation or Re-certification • Network Upgrade • Banner Upgrade • Data Center Network Redesign	Department
Program (PGM)	A **collection** of related projects that may span multiple departments and/or impact the Mason enterprise	• Data Governance • Change Management • Enterprise Architecture	EPMO or Domain / Department

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Figure 3 - Request Type Definitions

EPMO Role

There are three types of EPMO Roles. Outlined below are the diverse roles and responsibilities within the EPMO concerning project involvement, categorized as Driven, Involved, or Aware, offering clear insights into each role's level of engagement.

Governance will initially recommend the EPMO ‘s Enterprise Project Manager involvement; however, the final decision will be voted on and confirmed during Domain Council 2 (DC2) session. This process ensures that all Domain Council members agree, considering potential budget implications and Enterprise Project Manager resourcing constraints. If any revisions to the involvement level are needed during the project, they will be discussed during a Domain Council Update (DCU).

1. **Aware**:
    a. Project Governance: The EPMO is aware of the project but does not have direct involvement or control
    b. Methodology & Process: The project team may choose to follow EPMO guidelines, but it is not a requirement
    c. EPMO Accountability: The EPMO’s involvement is optional and based on project needs
    d. EPMO PMs Participation: Participation of EPMO PMs is flexible and determined by the project's requirements
2. **Involved:**

a. Project Governance: The EPMO is actively engaged in the project, offering oversight, guidance, and support on project management practices
    i. For facilities projects, the designated Involved PM should ensure all required workstreams are well-coordinated
    ii. For technology projects, the designated Involved PM should take on an oversight role

b. Methodology & Process: The project team is encouraged to follow EPMO guidelines, but it is not a strict requirement. This approach includes ensuring all necessary documentation is completed.

c. EPMO Accountability: The EPMO is responsible for specific workstreams within the project

d. EPMO PMs Participation: The EPMO PMs regularly attend and contribute to project meetings

3. **Driven**:

a. Project Governance: The EPMO has direct control and oversight of the project

b. Methodology & Process: The project team must follow EPMO guidelines and standards

c. EPMO Accountability: The EPMO PM is accountable for the project's success and is recognized by the business

d. EPMO Reps Participation: The EPMO PM leads all major project activities and ensures alignment with project goals.

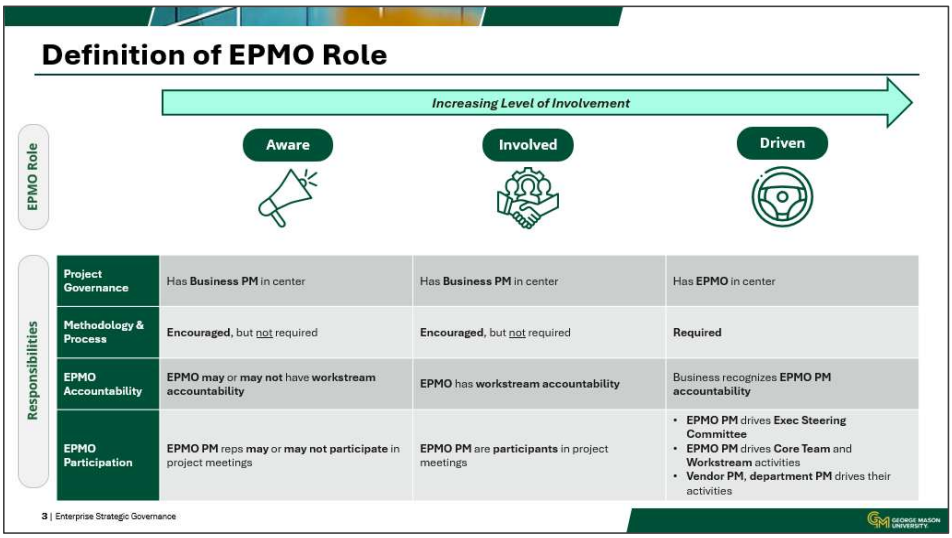

Figure 4 - The EPMO's Role

Project Size

The Framework is intended to be flexible and adapt to various classes of projects and their complexity. The size of a project is determined by a project's cost, duration, project team resource requirements, project risk, and mandates. GMU has developed a simple size model that identifies the size and project management requirements of any project. The model consists of two sections:

1. What governing body will oversee the project? Will the Domain Council oversee the project or will it be managed at the Enterprise Level?
2. What is the project size?

The size drives minimum project management, status reporting, and documentation requirements for the project.

During the proposal, within the Intake Process, the project will be assessed a preliminary project size via a conversation between the EBA and ESG leads. The project size would be validated in the project charter with the PM, EBA, and ESG leads. Then during the first Domain Council 1 (DC1) meeting, the council will accept the proposed preliminary project size and prioritization. During the Domain Council 2 (DC2) meeting, the Domain Council approves the project ~~charter~~ and finalizes the project size.

What Managing Body will Oversee the Project?

The first step in determining the management oversight body for a project is answering the following questions. If **any** of the answers is **Yes**, then the project will automatically be managed

on the **Enterprise Level**. However, if none are answered as **Yes**, the project's size will determine which managing body will oversee the project.

1. **External Mandate** – Is this project required to comply with a requirement from either outside GMU (e.g., State or Federal) or the Office of Audit, Risk, and Compliance?
2. **Internal Mandate** – Has Senior Management (e.g., President, Provost, Executive Vice President for Finance and Administration) determined a compelling need and provided authoritative instruction?
3. **Organizational Risk** – Is this project related to or does it address a risk on the University's Risk Inventory?

If it is determined that a project will be managed at the Enterprise Level based on the initial assessment, the Project Size Model calculations **must be executed** to determine and **ensure compliance** with reporting requirements.

The Project Size

Once the managing body that will oversee the project is determined, the second section helps determine the level of project management that is needed for the project. The base questions relate to:

1. **Expected Cost** – What is the estimated total cost to complete the project including software, hardware, licensing, contractor / implementation services, **AND** internal GMU labor (use $100,000/yr or $48/hr. to estimate)?
2. **Duration** – What is the total time expected to complete the project including planning, development, testing and/or training, as applicable?
3. **Project Team** – Who from GMU will be completing the work on the project? How many teams and Core team members will be involved in this project?
4. **Project Risk** – Have we done this type of project before? Do we have the necessary Project Management and/or Project Team experience?

Unit Two

DEFINITION OF PROJECT SIZE

Project size plays a crucial role in assessing the necessary level of project management, encompassing status reporting and documentation. For compliance with **Virginia Information Technology Agency (VITA) requirements**, projects meeting one or both conditions documented below must be reported to VITA to ensure adherence.

Factor	Small (S)	Medium (M)	Large (L)	Weight
Cost	< $250,000	$250,000 - $1,000,000	>$1,000,000	25%
Duration	< 6 Months	6 – 12 Months	> 12 Months	25%
Project Team	1 Team	2-4 Teams	5+ Teams	20%
Project Risk Have we done this before?	**Yes** – Experience from Project Manager **AND** Project Team	**Yes** – Either Experience from Project Manager **OR** Project Team	**No** Experience from **either** Project Manager **or** Project Team	30%

Reporting Requirements

Software Development Projects over **$100,000**

All **IT projects costing over $1,000,000** unless they are deemed instructional or research in nature

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Figure 5 - Project Size Definition

Commented [DK1]: Reference check with latest VITA standards

Each of the questions above has a specific weighted value. When answering these questions, the chosen value will determine the complexity and point value towards the total. This total will then determine the Project's Size.

Note: the costs noted in Figure 5 above refer to the technology components of projects.

Unit Two

PROJECT SIZE MODEL

Below are the calculations tied to the **Project Size**. Please answer all the criteria to determine the Project's Size.

Determine Project Size

Criteria	Description	Value	Complexity	Weight	Points
Cost	What is the estimated total cost to complete the project including software, hardware, licensing, contractor / implementation services, AND internal Mason labor (use $100K/yr/FTE to estimate)?	a) < $250,000 b) $250,000 - $1,000,000 c) > $1,000,000	a) 1 b) 2 c) 3	25%	a) 0.25 b) 0.5 c) 0.75
Duration	What is the total time expected to complete the project including planning, development, and testing (if applicable)?	a) < 6 Months b) 6 - 12 Months c) > 12 Months	a) 1 b) 2 c) 3	25%	a) 0.25 b) 0.5 c) 0.75
Project Team	Who from Mason will be completing the work on the project? How many teams will be involved?	a) 1 Team b) 2-4 Teams c) 5+ Teams	a) 1 b) 2 c) 3	20%	a) 0.2 b) 0.4 c) 0.6
Project Risk	Have we done this type of project before? Do we have the necessary Project Management and/or Project Team Experience?	a) Yes – Experience from Project Manager AND Project Team b) Yes – Either Experience from Project Manager OR Project Team c) No Experience from either Project Manager or Project Team	a) 1 b) 2 c) 3	30%	a) 0.3 b) 0.6 c) 0.9
Project Size		Complexity*Weight = Points **Total Points / Score:** **Small** = <1.66 **Medium** = >1.66 and <2.33 **Large** = >2.33			

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Figure 6 - Project Size Model

Project Management Requirements

The results of this model help deliver the minimum requirements for managing the project, status reporting, and what work is needed to document the work accurately and completely. If a project's size is determined to be either Small or Medium, it will be managed at the Domain Council level. If the project is determined to be Large, it will automatically be managed at the Enterprise Level. The table below outlines the project management requirements, tailored according to project size and encompassing vital aspects like status reporting and documentation.

Unit Two

REQUIREMENTS BASED ON PROJECT SIZE

Outlined below are the **project management requirements**, tailored according to project size and encompassing vital aspects like status reporting and documentation.

Project Management Requirements			
Requirement	**Small (S)**	**Medium (M)**	**Large (L)**
Minimum Project Management	Project manager assigned (not required to be part of the EPMO)	Professional Project Manager assigned (not required to be part of the EPMO)	EPMO Project Manager assigned as primary
Status Reporting	• **Bi-weekly status reporting** to the Project Inventory System	• **Bi-weekly status reporting** to the Project Inventory System • Monthly with Project Sponsor	• **Bi-weekly status reporting** to the Project Inventory System • Monthly with Project Sponsor • Quarterly review with Executive Council
Project Documentation	• **Proposal Collaboration Worksheet (PCW)** • **Project Charter** or Statement of Work (must include schedule) • **Project Closeout Document**	• **Proposal Collaboration Worksheet (PCW)** • **Project Charter** • Project Planning Document • **Project Schedule** • **Issues and Risks log** • Communications Plan • Deliverables Acceptance • Approvals to Proceed & Operate • **Project Closeout Document**	• **Proposal Collaboration Worksheet (PCW)** • **Project Charter** • **Project Cost Estimate** • Project Planning Document • **Project Schedule** • **Issues and Risks log** • **Communications Plan** • Deliverables Acceptance • Approvals to Proceed & Operate • Quality Management Plan (test, transition to operations, training) • **Project Closeout Document**

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Figure 7 - Project Size-Based Requirements

Project Framework Components

The Project Framework consists of multiple elements working together to help ensure successful delivery of projects. These elements are:

- **Project Phases** – The project lifecycle is segmented into specific blocks, each with its own objectives, deliverables, and tasks required to progress.
- **Tasks** – The required activities that need to be completed to ensure compliance and consistent execution
- **Milestone** – A significant point or event in a project, program, or portfolio.
- **Templates** – Standardized forms or documents that collect and report consistent data about the project so that it may be effectively tracked through the project lifecycle. All project templates are available on the EPMO's site located at https://ofeg.gmu.edu/project-management/.

Project Management Framework Lifecycle

The Project Management Framework Lifecycle consists of a series of phases with specific project management deliverables and Domain Council meetings which control the movement between the phases. The Domain Council (DC) is a portfolio-level structure based on client area domains. Each council will be accountable for project activation approval, prioritization, and progress monitoring. Domain Councils are grouped based on their place within the University organization. For example, all Administrative and Operations departments are grouped into a single Domain Council, while all Academic departments and functions are grouped into a separate Domain Council. Domain Councils, regardless of which part of the university structure it represents, have the same responsibilities to activate, prioritize and monitor progress of projects within their portfolios. As projects move through the lifecycle phases, the applicable Domain Council receives progress updates. The regular updates to the Domain Council allow projects to build on the work performed in previous phases and serve the structure to keep the project moving forward. Regular, scheduled updates to the applicable Domain Council are an integral part of the PMFL, as shown below.

The PMFL consists of four phases:

1. **Initiation** – Document the project deliverables and resources needed to complete the project.
2. **Planning** – Develop the project schedule, assign resources, clarify risks.
3. **Delivery** – Do the project work (execution) and report on progress (monitor and control).
4. **Closeout** – Capture lessons learned, document project successes for future use.

The following table is a summary of the PMFL, associated responsibilities, tasks, and EPMO Project Lifecycle Documents. They will be described in detail in subsequent sections:

Figure 8 - Project Management Framework Lifecycle Phases

Intake*

Figure 9 - PMFL Intake Callout

***Note**: *While not part of the PMFL, Intake is vital to the capture and review of project requests.*

Intake is separate and distinct from the PMFL. A project is established after formalized reviews are conducted, and governing bodies have been determined. From this point, the request then enters the project management framework. For additional details on Intake, see the EPMO's website located at https://ofeg.gmu.edu/project-management/.

Intake Request Process:

Guidance for submitting an Intake Request is provided below. The EBA team, in collaboration with the requesting functional office, are responsible for coordinating this process.

Please note that submitting an Intake form does not imply acceptance of the request. Instead, the request process aims to promote equity and transparency among partners by employing consistent selection criteria and review procedures for all submissions.

The Intake Process:

1. **REQUEST: Submit Your Request** – To initiate the process, the requestor must obtain sponsorship, gather all supporting business case materials, and complete the Team Dynamix Technical Business Solution Intake Request and submits to the Enterprise Business Analysis team or EBA. The Intake document for project requests provides a brief description about the request, the current state, current pain points and restrictions, the audience, and the ideal state for the requested solution.
2. **INTAKE: Initial Review** – The EBA will complete the Proposal Collaboration Worksheet (PCW) with input from requester, sponsor, and partners. The EBA will send the completed PCW and additional DC1 One-Pagers to ESG.
3. **ASSESS: Governance Review** – The ESG team will determine the DC1 topics and will notify the appropriate parties if selected to discuss. If agreed upon to move forward as a project, there will be three emails created and distributed:
    a. DC1 Action Items,
    b. DC1 Minutes, and
    c. Assigned Project Number and an Enterprise Project Manager[3]
    d. Determine EPMO's role
4. **AUTHORIZE: Approval, Prioritization, and Scheduling** – The final review of new proposals, including approval, activation, resource assignment, and prioritization, takes place within the leadership roles at GMU. This stage ensures alignment with university business needs and objectives.

If you have any questions or require additional information, please contact the Enterprise Business Analysis Team.

Primary Responsibility: Business Analyst

Tasks:

After the Requester completes the form and submits it to the EBA team, the following tasks are required during the Intake Phase:

- The EBA team develops the Proposal Collaboration Worksheet (PCW) with input from requester, sponsor, & partners.
- The EBA team populates the DC1 One-Pagers.
- Once these documents are completed, EBA sends the Proposal to ESG

[3] The Enterprise Project Manager is assigned if the EPMO's role in the project is defined as *Involved* or *Driven*.

Project Lifecycle Documents:

- **Proposal Collaboration Worksheet (PCW)** – This document concentrates on defining the project's scope and purpose. It serves as an official record of authorization for the use of resources and marks the initiation of the project acceptance phase. The report gathers pivotal information for the domain council, enabling them to make a well-informed decision on the project's viability. It includes an overarching view, specific aims and objectives, partner risk evaluations, and a value scoring report that assesses the project based on various critical factors. **DC1 One-Pager** – This document completed by the EBA Team, provides a one-page summary of the PCW for Domain Council meetings. It includes an executive summary, key partners, and a link to the full report. The page also presents value scoring and recommendations for council discussions and decision-making.

Domain Council 1 (DC1):

During DC1, the Requester completes a Project Request presentation to the Domain Council. The Domain Council will complete the following activities:

- Confirm the preliminary project size and prioritization criteria
- Approval to proceed with project creation and PM assignment, or defer the project
- If approved by the Domain Council, the project goes into the inventory and is updated to Accepted in the Portfolio Request Lifecycle

The Domain Council will approve a request that **SHOULD** become a project in the applicable Domain Portfolio. Following this determination, the tasks below will be completed:

- EPMO's role in the project will be determined
- An Enterprise Project Manager will be assigned
- Additional project vetting is approved to proceed

Primary Responsibility: Enterprise Strategic Governance (ESG)

Tasks:

- In preparation for DC1, ESG will determine DC1 topics and notify the appropriate parties.

Project Lifecycle Documents:

After DC1 is completed, the subsequent emails are sent:

- Email listing the DC1 Action Items
- Email documenting and sharing the DC1 Minutes
- Confirm EPMO's role in project
- Email and identify the assigned Project Number and Enterprise Project Manager if the project is approved by the applicable Domain Council

Initiation

Figure 10 - PMFL Initiation Callout

The ***Initiation*** Phase is the first phase of the project lifecycle. The phase begins after DC1 approves a request that **should** become a project in the Domain Portfolio. During initiation, the project is more fully defined so that it may be properly resourced and realistically planned in the next phase. The Enterprise Project Manager will still be the primary party responsible for this phase and will be the primary point-of-contact (POC) of coordination for additional engagement. During this time, the project manager proceeds to fully describe the project scope and prepare the project charter. The major deliverable of the phase is the project charter, which:

- Identifies the partners
- Defines the project's time period
- Provides the rationale for the project
- Identifies the core project deliverables, assumptions, and potential risks
- Outlines project cost estimates and resource needs

Primary Responsibility: Enterprise Project Manager with support from the Business Analyst

Tasks:

After DC1, the Enterprise Project Manager will be the primary responsible party with support from the Business Analyst. They will lead the following activities:

- Enterprise Project Manager will coordinate additional engagement between requester, sponsor, & partners
- Enterprise Project Manager to complete the Project Charter and submit it to Enterprise Strategic Governance

Project Lifecycle Documents:

- **Project Charter** – This document focuses on the scope and purpose of the project. It documents the authorization to utilize resources and begin the planning phase of the project.
- **DC2 One-Pager** – The Enterprise Project Manager will complete this document. The DC2 One-Pager, an extension of DC1, offers a detailed one-page overview enriched with project charter information for Domain Council meetings. It delves into key personnel, business goals, project objectives, risks, scope, and timelines, aiding informed decision-making on project approval, deferral, or rejection.

Domain Council 2 (DC2):

During DC2, the Requester, with support from the Enterprise Project Manager, completes a Project Planning presentation to the Domain Council. The Domain Council will review and approve the following activities:

- Scope, Cost, Schedule, Resources, Project Governance Structure
- Reconfirm the project size and prioritization criteria
- Rank project within active portfolio

- Schedule the project start date

The Domain Council will determine **WHEN** a project should be started considering the full Project Portfolio. Following this determination, the items below will be completed:

- Current Active inventory is considered
- Project feasibility is considered
    - ITS capacity is also considered if the project involves technology
- Project may be scheduled to begin at future date
- Project is given priority rank within portfolio

Primary Responsibility: ESG

Tasks:

- In preparation for DC2, ESG will determine DC2 topics and notify the appropriate parties, and update the Project to Scheduled or Active in the Portfolio Request Lifecycle

Project Lifecycle Documents:

After DC2 is completed, the following emails are sent out:

- Email listing the DC2 Action Items
- Email sharing the DC2 Minutes
- Email stating the Project is Approved with an expected Project Start Date

Planning

Figure 11 - PMFL Planning Callout

The ***Planning*** Phase builds on information captured in the Initiation Phase. A well-developed and holistic plan helps ensure that the project team completes a project successfully, on time, on schedule and on budget with fewer surprises and deviations from the originating charter. The project plan must consist of the schedule and resources for the project, budget requirements, performance measures, and clear actions for managing change, risk, and communications. The phase concludes with a sponsor-approved project plan.

Primary Responsibility: Enterprise Project Manager with support from the Business Analyst

Tasks:

After DC2, the Enterprise Project Manager will collaborate with the project team to complete the planning documentation.

- Further develop the Scope and refine the Project Schedule
- Create a Statement of Work, if applicable

Project Lifecycle Documents:

- **Planning Document** – The planning document further refines the information in the Project Charter by identifying the actual resources assigned to the project and the durations and work required for the deliverables. Finally, the Planning Document also includes the Project Budget if one has been developed for the project.

- **Project Schedule** – The project schedule provides an actual timeline of the project tasks and deliverables and assigns them to specific resources on the team.
- **Communications Plan** (Required for Medium and Large Projects) – Outlines the project's communications needs from the start so that audiences may be identified and messages properly defined throughout the project execution.

Delivery

Figure 12 - PMFL Delivery Phase Callout

Delivery consists of two specific sub-phases that occur concurrently. In the Delivery phase, the actual project deliverables are completed, and progress is reported. Specifically, it includes:

- **Execution** – Doing the work identified in the project plan and schedule.
- **Monitoring and Control** – Keeping the plan and schedule up to date, reporting project progress, issues, risks, etc. and ensuring the project is on track.

With an approved plan, a project can move into the Delivery-Execution (Execution) Phase of the project lifecycle. This phase is where "the work gets done;" where the project team completes the tasks outlined on the project schedule and develops the project deliverable(s). The Execution Phase concludes when the project deliverable(s) achieved are accepted by the users and the sponsor. The second portion of the Delivery Phase is Monitor and Control. Monitor and Control consists of the activities needed to track and control the work. The team delivers status reports, monitors, and reports on issues and risks, creates change requests, and conducts procurement activities.

NOTE – Please review Appendix 5 – Special Projects that lists specific requirements for technical infrastructure projects.

Primary Responsibility: Enterprise Project Manager

Tasks:

- The Enterprise Project Manager will manage the project execution activities.
- Steering Committees are established and include the initial project kickoff and regular updates to leadership.

Project Lifecycle Documents:

- **Project Status and Reporting** *(Ongoing)* – The project's size will determine the level of project status reporting. At a minimum bi-weekly status reporting to the Project Inventory System is required.
- **Acceptance of Deliverables** – The Acceptance of Deliverables clearly articulates how each of the deliverables identified in the Project Planning Document and prior was completed and approved during the project's execution.

Domain Council Update (DCU):

The Enterprise Project Manager will share Project Status Updates and impacts due to scope and/or schedule changes with the Domain Council to discuss any major risk and mitigation strategies.

The Domain Council will approve any **scope or schedule changes** to a project in the applicable Domain Portfolio. During DCU the following items will be discussed and approved:

- Major risk and mitigation strategies are discussed
- Approval to Operate is approved
- Approval to Closeout is approved

Primary Responsibility: Enterprise Strategic Governance, upon request from the Enterprise Project Manager

Project Lifecycle Documents:

- **Operational Support Process Document** *(Optional)* – In most cases, …
- **Approval to Proceed** *(Optional)* – In some cases where the project is iterative or agile in nature, multiple releases may require interim checkpoints during the Delivery Phase.
- **Approval to Operate** *(Optional)* – The Approval to Operate provides an opportunity to provide for interim releases of deliverables while the overall project is on-going. This document clarifies how key project elements are transitioned to full production use.

Closeout

Figure 13 - PMFL Closeout Callout

Projects are temporary in nature and a project team must complete the activities of the final phase – ***Closeout*** – to officially complete the project. Conducting this phase's activities is vital to continuous improvement efforts and the successful transition of the project deliverable(s). After achieving acceptance of the deliverable(s), the project team documents lessons learned and archives project documentation for future use. The project manager transfers the project deliverable(s) to the operations and support staff or unit, who will maintain it as an operational activity. Finally, and often overlooked, the project team disbands. The project team is recognized for the accomplishments associated with the project, and an optional virtual or in-person team celebration is held.

Primary Responsibility: Enterprise Project Manager

Tasks:

- The Enterprise Project Manager will complete the Closeout Document.

Project Lifecycle Documents:

- **Project Closeout Document** – This document provides the final disposition of the project for leadership and senior partners. Completion and agreement by the project team on this document indicate the project is closed.

Domain Council Final (DCF):

During DCF, the Enterprise Project Manager and Project Sponsor inform the Domain Council of Project Completion.

The Domain Council in the applicable Domain Portfolio will be informed of the project completion. During DCF the following items will be reviewed:

- Enterprise Project Manager reviews Project Closeout activities and documentation

Primary Responsibility: Enterprise Strategic Governance upon request from the Enterprise Project Manager

Tasks:

- ESG confirms close out documents and closes project entry in the Domain Portfolio

Change Control

Change control or change management is not a specific phase in the PMFL, however, it is a critical function for executing all projects, regardless of type. Changes are deviations, from the original Planned Scope, Schedule and/or Budget. According to the PMBOK® Guide, a change is defined as any modification to project documents, deliverables, baselines, or plans. Any change to Scope or Schedule will result in a change to the Project Budget. Changes must be actively managed, reviewed, approved and incorporated into the existing schedule and/or scope to ensure they are successful. Note that changes of any magnitude can happen at any stage of the project.

All Project Templates contain a Document Control section. When changes occur to a key Project Document, the changes must be reflected in the Document Control section. The Project Leaders, including the Enterprise Project Manager, are empowered to manage, review and discuss changes within the project team. When these changes occur, the Enterprise Project Manager will advise the applicable Domain Council of the change at the next meeting, following the Project Team's decision regarding the change.

Most changes can be handled at the Project Team level; however, certain changes, particularly those with considerable budget impacts of those that will affect the broader GMU community must be reviewed with the applicable Domain Council, The Enterprise Project Manager is expected to prepare a DCU, documenting the impacts of executing and not executing the change. Changes outside of the Domain Council's approval authority will be escalated to the Executive level for handling. The table in the following figure gives guidance on the types of changes reviewed and approved at each level.

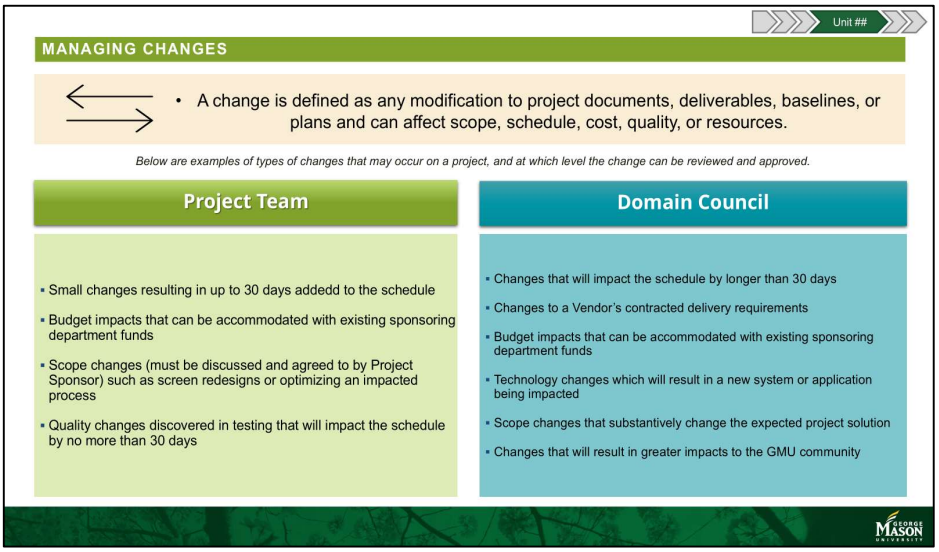

Figure 14 - Change Control Overview

The guide above provides some sample types of changes but is not all inclusive. Project managers should discuss all changes with their Project Sponsor if they have concerns about the level required for approval or review. Even if approved at a lower level, some changes, depending on the Project Sponsor's decision should be communicated to the Domain Council and/or Executive level.

Project Management Policy and Reporting Requirements

George Mason University currently operates under a Level 3 operating authority within the Commonwealth of Virginia. This authority provides a level of autonomy as it relates to the management of projects. University Policy 1310 (https://universitypolicy.gmu.edu/policies/information-technology-project-management/), provides overall guidance for project management. However, in certain cases, there are types of projects that must be reported at the state level, and GMU must comply with this requirement.

There are two situations which require reporting:

1. Software Development Projects over $100,000
2. All IT projects costing over $1,000,000 unless they are deemed instructional or research in nature.

When a project meets one or both conditions, it must be reported to the Virginia Information Technology Agency (VITA). Details on reporting requirements can be found in the COV ITRM Project Management Standard at: https://www.vita.virginia.gov/policy—governance/itrm-policies-standards/.

Maintaining Project Information

To ensure accurate and timely project data within Team Dynamix (TDX) and associated supporting sites (e.g., Lifecycle Documents), Enterprise Project Managers are required to adhere to the following procedures:

1. **Project Inventory/Lifecycle Document Management:**

   All documents referenced within the EPMO Project Lifecycle Documents section must be completed in accordance with the identified project lifecycle phase.

   Completed documents are to be uploaded and associated with the relevant project within TDX for proper tracking purposes, unless explicitly documented otherwise.

2. **TDX Project Entry Updates:**

   Enterprise Project Managers are responsible for maintaining up-to-date information within their respective project entries in TDX.

   Specifically, the following data elements that are reported in the Project Dashboard must be reviewed and updated at a minimum every two weeks before the end of day Friday. Required updates include Overall Project Status, Schedule Status, Funding Status, Key Accomplishments, Upcoming Critical Path Tasks on the schedule, Risks, and Next Steps.

   Any changes to the project status must be reflected in TDX within 24 hours of the change.

3. **Power BI Dashboard Data Integrity:**

   Enterprise Project Managers are responsible for the accuracy of the data within their project entries in TDX. This requirement ensures that the Power BI dashboards, which are refreshed daily, reflect the most current project status and information. A comprehensive list of Automated Project Tools is provided in Appendix 3.

Appendix 1 – Efforts Not Considered EPMO Projects

To aid in distinguishing operational efforts from projects, the list below is a compilation of examples that **do not meet** the criteria for being classified as EPMO Projects.

- Service provisioning (hosting, voice, network, enterprise applications, etc.)
- Hardware refreshes to maintain support for existing services (Servers, PC's, Storage)
- Network refreshes if other than a complete swap out of equipment for new models offering new functionality (e.g., upgrade to the use of Nexus technology)
- Software or technology upgrades except where the upgrade is a major release
- Increasing capacity for an existing system
- Application patch release updates
- Operating system patch release updates
- Desktop integration release
- Problem identification, research, and resolution for daily issues due to program, technical, or business errors
- Operation and application security updates
- Minor process and/or procedure modifications
- Database reorganizations and general housekeeping
- Business process re-engineering that changes process but not technology

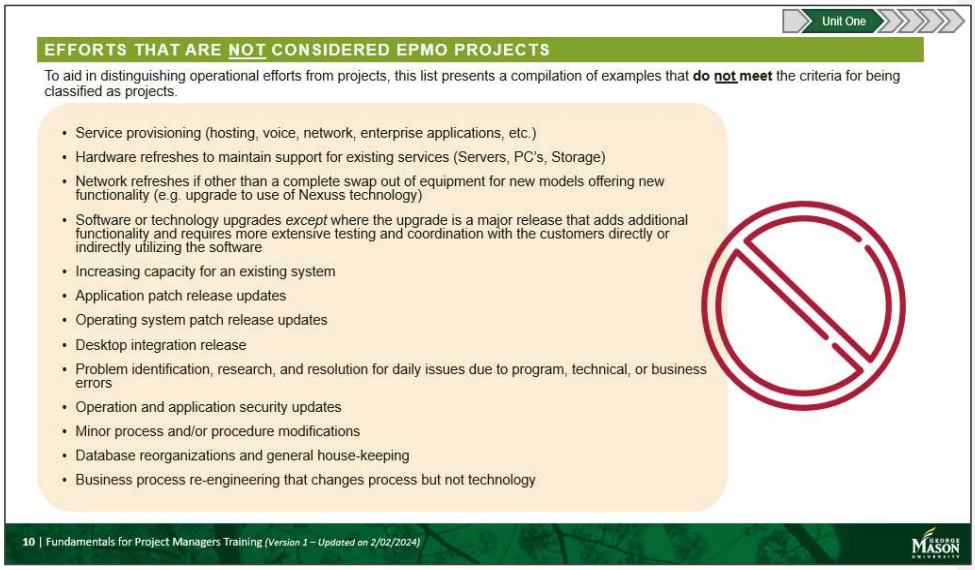

Figure 15 - Non-EPMO Efforts

Appendix 2 –Project Management Templates

Standardization is the lifeblood of the PMFL, as it provides the necessary repeatability that ensures all aspects of a project are included. Part of the focus on standardization involves having consistent templates for capturing the needed information to manage the project scope, effort, and deliverables throughout the lifecycle.

The GMU PM Framework includes the following lifecycle templates to satisfy the project management deliverables:

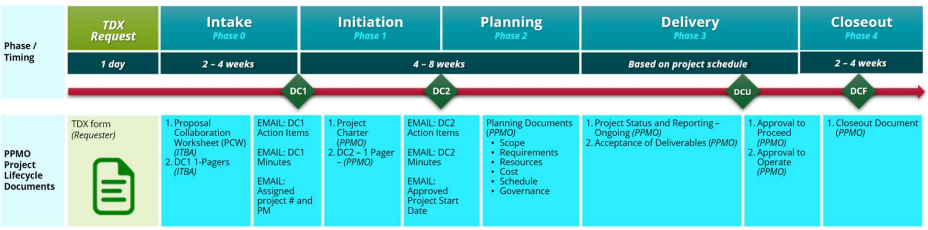

Figure 16 - PMFL Artifacts by Phase

Each deliverable applies to a specific phase of the project lifecycle, and the approval of the deliverable is what constitutes completion of the phase. Templates are available on the EPMO's website: https://ofeg.gmu.edu/project-management/. These templates are provided to ensure that the required information is captured and reported at each phase of the project lifecycle.

#	Template Name	Lifecycle Phase	Primary Responsible
1	Proposal Collaboration Worksheet (PCW)	Intake	EBA
2	Domain Council 1 (DC1) One-Pager	Intake	EBA
3	Project Charter	Initiation	Enterprise Project Manager
4	Domain Council 2 (DC2) One-Pager	Initiation	Enterprise Project Manager
5	Planning Document	Planning	Enterprise Project Manager
6	Project Status and Reporting (Ongoing)	Delivery	Enterprise Project Manager
7	Operational Support Processes	Delivery	Enterprise Project Manager
8	Acceptance of Deliverables (Optional)	Delivery	Enterprise Project Manager
9	Approval to Proceed (Optional)	Delivery	Enterprise Project Manager
10	Approval to Operate (Optional)	Delivery	Enterprise Project Manager
11	Project Closeout Document	Closeout	Enterprise Project Manager.

Each project template is intended to be self-explanatory; instructions are written directly within each template explaining the type of information to capture and how to complete it.

Core Project Information – The Header

Each template consists of a standard set of project information that links the templates, provides key background, and contact information for the project. The rest of the template includes the information required to satisfy project management needs.

Core information includes:

- Project sponsor information
- Points of Contact
- Core customers (Impact Group)
- Strategic Alignment / links to other efforts (e.g., Audit finding)

For ITS projects, the EPMO team typically assists with completing this information.

1 - Proposal Collaboration Worksheet (PCW)

The Proposal Collaboration Worksheet (PCW) is the starting point for all internal project requests. It is a high-level description that aids governance bodies, advisory councils, and/or George Mason leadership in reviewing a request to identify any obligations for compliance, regulations, policy adherence, and other standards identified by federal, state, university, or any other applicable governing bodies.

The document concentrates on defining the project's scope and purpose. It serves as an official record of authorization for the use of resources and marks the initiation of the project acceptance phase. The report gathers pivotal information for the domain council, enabling them to make a well-informed decision on the project's viability. It includes an overarching view, specific aims and objectives, partner risk evaluations, and a value scoring report that assesses the project based on various critical factors.

Primary Responsibility: Enterprise Business Analyst

2 - Project Charter

The Project Charter focuses on the scope and purpose of the project. It documents authorization to utilize resources and begin the Planning Phase of the project. The charter includes the following information not previously captured:

- **Solution Description** – What it is and what it will do
- **Scope** – What the project will and will not achieve
- **Deliverables** – What will be developed and what constitutes the success criteria for the project
- **Resource Requirements** – What types of resources will be needed to complete the project deliverables
- **Dependencies** – Any external dependencies that may limit or impact this project's completion
- **Assumptions** – Technical or functional project assumptions around the delivery of this project
- **Risks** – Any potential risks that would impact the project's success

- **Cost Estimates** – The estimated costs to implement and operate the solution. Use the project estimation tool to develop the estimates.

Primary Responsibility: Enterprise Project Manager

3 - Planning Document

The Planning Document provides an overview of the project plan for leadership and senior partners. A Project Schedule must always accompany the Planning Document, and when required, a Communications Plan. These documents are presented at an Execution Readiness Review and whenever possible should be approved before the execution of the Project Schedule.

The Planning Document builds on the Project Charter by identifying the specific project approach, formalizing the deliverables by estimating the work involved, responsibility, and acceptance criteria. Charter information refined includes:

- **Dependencies & Assumptions**
- **Risks & Mitigations** – Including what will be done to mitigate or address the risk vs. merely defining it
- **Project Team** – Named resources are also identified from the teams identified within the Charter

Primary Responsibility: Enterprise Project Manager

Project Schedule

The Project Schedule may be in any format that is most useful to the project team; however, it must include tasks, durations, resource assignments, and dependencies across the deliverables. Each deliverable should be clearly articulated within the project schedule.

Communications Plan

During the Planning Phase, communications needed for the project are identified and captured on a Communications Plan that includes:

- **Types of communication** – email, website, in-person, news blast, etc.
- **Audience** – who will receive the information, the target audience
- **Timing** – when during the project lifecycle the communications are needed (note, specific dates may not be formalized here, but general timelines relative to the project lifecycle should be identified)

Primary Responsibility: Enterprise Project Manager or assigned Communications Specialist[4]

4 - Project Status and Reporting (Ongoing)

Project Status and Reporting is a crucial aspect of Project Management, involving the systematic collection and communication of project-related information. It provides partners with

[4] Most projects managed at the Enterprise level will be assigned a Communications Specialist to work with the Project Manager. The Communications Specialist is usually assigned by the sponsoring department.

real-time updates on project progress, milestones achieved, and potential challenges. Effective status reporting ensures transparency, facilitates informed decision-making, and helps in identifying and mitigating risks promptly. It also serves as a communication tool, aligning team members, management, and other partners towards common project goals.

Primary Responsibility: Enterprise Project Manager

5 - Acceptance of Deliverables (Optional)

Acceptance of one or more deliverables occurs with an Acceptance Review. The review would ideally occur as an in-person demonstration to the relevant partners of the deliverable completed, which can also serve as an official acceptance test date. However, an in-person meeting is not required. As many projects have more than one deliverable that may be completed at different times during the Delivery Phase, all deliverables may be on a single document, or it is also acceptable to have more than one Acceptance of Deliverables document for a single project. Multiple Acceptance Reviews may be used to facilitate the implementation of the full solution when a single Acceptance Review is not feasible.

The deliverable(s) and acceptance criteria listed here should match what is in the signed/approved Project Plan and any approved change requests. Information captured about the deliverable includes:

- Completion Date
- Acceptance Criteria
- Scope accomplished
- Dependencies or Risks addressed
- Estimated and Actual hours if available

Additionally, any information about deliverables that were originally identified but not completed during the project will also be captured so that they are noted for other disposition (e.g., future project, no longer required, etc.).

Primary Responsibility: Enterprise Project Manager

6 – Operations Support Processes

The Operations Support Processes document is required when the final project solution or deliverable is a new or redesigned process, system or application which will require ongoing support, reporting and/or evaluation in production. The document provides information on how the project will be supported, which team or teams will be involved in supporting, and establishes the Owner. The document also details the data classification and escalation procedures in production.

Primary Responsibility: Enterprise Project Manager

7 - Approval to Proceed (Optional)

Approval to Proceed is an optional tool used, typically in Iterative projects where there are specific Go/No-go points identified during the project's Delivery or if there is a key decision point during the lifecycle. This tool is used to grant approval to proceed to the next step during any phase of the project (go / no-go, checkpoint, move into dev or production server, or any other next step that is not a completed deliverable).

The document captures the action or decision point with a description of what is being approved and the next steps after the approval. The sponsor or delegate then /approves the document to grant the approval to move forward.

Primary Responsibility: Enterprise Project Manager

8- Approval to Operate (Optional)

The Approval to Operate is an optional tool used to designate when one or more deliverables is officially released and transitioned to operational status, effectively ending the project work on that particular deliverable. There may be one or more Approval to Operate documents completed for a project as needed to satisfy all the deliverables requiring a move to an operational state within the project.

The Approval to Operate captures:

- The deliverable moving to operations, including who will own it once it is in production and operational
- Any deliverable previously transitioned to operations earlier in the project lifecycle

Primary Responsibility: Enterprise Project Manager

9 - Project Closeout Document

The final required template in the Project Management Framework Lifecycle is the Project Closeout Document. This document builds on the Deliverable Acceptance by capturing additional details about the project that are not deliverable-specific. There are two main purposes of the Project Closeout:

- **Communications** – capture key elements of the project and its related successes that can be used in marketing and communications materials such as Annual Reports, Executive Briefings, newsletters, and more.
- **Future process improvements** – capture lessons learned, successes, areas for improvement related to the effort to improve performance and planning on future projects.

Primary Responsibility: Enterprise Project Manager

Appendix 3 – Automated Project Tools

There are many different project management tools available for various aspects of project management. This Project Management Framework is tool-agnostic. Enterprise Project Managers may use any tools that assist with the management of their projects provided the core project management templates and deliverables are captured and reported consistently. Examples of tools available at GMU for project management include:

Tools that are available as IT service at GMU without additional costs:

- **Team Dynamix (TDX)**: Team Dynamix (TDX) Project Module is a comprehensive tool designed for managing projects of various sizes and complexities. It offers a centralized platform to plan, execute, and track project work, resources, and finances. TDX is required for DC Portfolio Projects tracking and reporting. Enterprise Project Managers may use any tool that they deem required to manage their projects but regular updates in TDX are required if their projects are in a DC Portfolio.
- **Microsoft Teams**: Microsoft Teams is a unified communications platform that combines persistent workplace chat, video meetings, file storage (including collaboration on files), and application integration. The service integrates other Office 365 applications.
- **Microsoft Planner Premium**: Microsoft Planner Premium is a planning application available on the Microsoft Office 365 platform. Planner enables users and teams to create plans, assemble and assign tasks, share files, communicate, and collaborate with other users, and receive progress updates via various means on the Office 365 platform.
- **Microsoft Power BI**: Microsoft Power BI is a business analytics tool that provides interactive visualizations and business intelligence capabilities. The Projects Power BI dashboards contain visual representations and analyses of current projects and requests in GMU's Project Inventory. The dashboard provides partners with a comprehensive overview of the project landscape and enables informed decision-making. The dashboards consist of multiple visualizations; each offering varied options to sort and filter the information to focus on what is most relevant to you.

Appendix 4 – The Two Lifecycles – Portfolio & Projects

In addition to the PMFL, project requests also travel through a Portfolio Request Lifecycle. The Portfolio Request Lifecycle focuses on the project request as it moves through a governance cycle – approval, prioritization, queue, etc. While project management ensures projects are done the right way – "doing projects right" – the portfolio lifecycle ensures that GMU is selecting and working on the right projects – "doing the right projects."

The figure below shows why both lifecycles are critical to ensure the university's strategic plans continue to align and move forward.

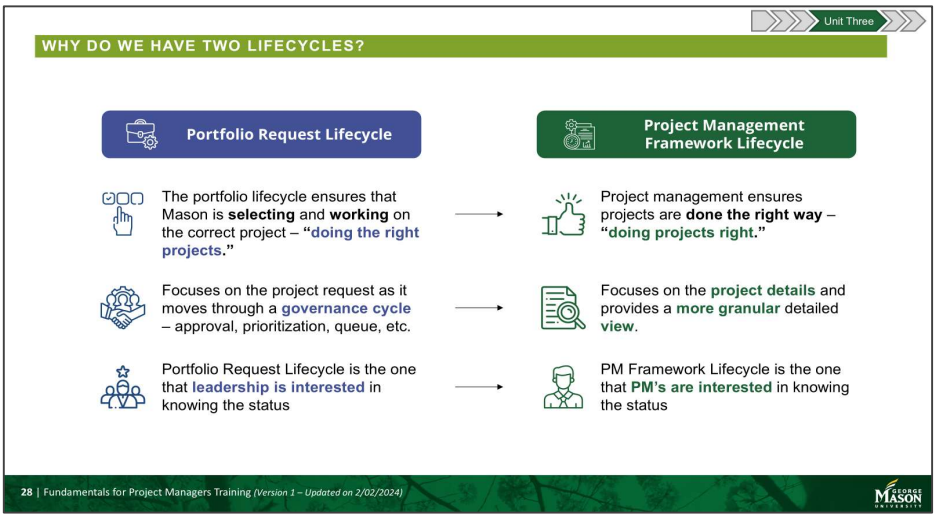

Figure 17 - Why Two Lifecycles are Needed

The table below defines the stages of the Portfolio Request Lifecycle.

Portfolio Request Lifecycle	Request Lifecycle Description
Intake	Project requests are submitted for analysis, evaluation, and decision-making.
Accepted	Project is accepted into the portfolio queue.
Scheduled / Active	Project has been approved via DC2. Projects could be conducting high-level planning/scheduling. Projects could also have an assigned a planned start date and allocated resources. Projects transition to actively being worked on from Project Management Planning through Closeout – planning and completing project deliverables.

Portfolio Request Lifecycle	Request Lifecycle Description
Operational *(Request Closed)*	Project has been approved for closure via DCF. Project is officially complete, and all the project management closeout documents are approved. Request is formally closed as complete.
On Hold	Request has been approved but has been placed on hold due to resource or other issues
Canceled	The project has been terminated before completion.
Rejected	The project request has been evaluated and deemed unsuitable for implementation.

Appendix 5 – Projects Impacting Technical Infrastructure

All large-scale or impactful projects will be executed by the EPMO and be controlled by the established Governance processes identified in the PM Framework. There is, however, a specific type of IT project, which has additional Governance requirements. Any type of project that impacts GMU's technical infrastructure must be submitted to the Request for Change (RFC) Committee for review and approval.

Enterprise Project Managers facilitate the creation of the RFC request, working with an ITS colleague to ensure completeness and accuracy. ITS' leadership manages the RFC and as the system owners for technical infrastructure, they are required to manage all changes to the infrastructure.

Technical infrastructure include initiatives such as the wiring required for a new data center or building (Facilities will manage the project, but their Enterprise Project Manager will coordinate with ITS for all technical wiring and infrastructure needs), implementing new hardware in a data center or replacing all Wi-Fi devices throughout the campus. This list is not exhaustive of technical infrastructure projects, if an Enterprise Project Manager has any questions as to whether a project may have technical infrastructure impacts, the Enterprise Project Manager should contact ITS for clarification.

Appendix 6 – Definitions

Term	Definition
Agile Software Development	A software engineering approach utilizing a series of repeating short development cycles called sprints to design, develop, and deliver the final project deliverables. For more information, see the Agile Alliance website: https://www.agilealliance.org/agile101/
Deliverable	A final product or product component that must be provided to a client or partner according to contractual stipulations.
Domain Council (DC)	The portfolio structure is based on client area domains. Each council will be accountable for project activation approval, prioritization, and progress monitoring. There are four Domain Councils within the lifecycle: Domain Council 1 (DC1), Domain Council 2 (DC2), Domain Council Update (DCU), and Domain Council Final (DCF).
Governance	The structure by which roles and relationships between project team members and an organization's high-level decision makers are defined.
Milestone	A significant point or event in a project, program or portfolio.
Phase	A distinct stage in a project life cycle. Each phase has its own purpose and associated project management deliverable.
Portfolio	A collectively managed set of programs and projects.
Portfolio Request Lifecycle	The specific set of phases and reviews a request submitted to the Portfolio follows.
Project	A temporary endeavor undertaken to create a unique product, service or result. A project is temporary in that it has a defined beginning and end in time, and therefore defined scope and resources, and a project is unique in that it is not a routine operation, but a specific set of operations designed to accomplish a singular goal. (PMI). See the Project Management Institute's (PMI) website for additional information: https://www.pmi.org/about/learn-about-pmi/what-is-project-management
Project Management	The application of knowledge, skills, tools, and techniques to project activities to meet the project requirements. (PMI)
Project Type	A pre-defined set of Framework components configured to support delivery within certain project dynamics.

Term	Definition
Resource(s)	The elements needed for a project to successfully meet its objectives. Examples of resources include equipment, staff, locations, facilities, and money.
Scope	The scope of a project constitutes everything it is supposed to accomplish and be deemed successful.
Scrum	An Agile-specific project management approach to support teams in complex product development. Scrum consists of Scrum Teams and their associated roles, events, artifacts, and rules. For additional information, see https://www.scrum.org/
Template	A pre-defined structure or pattern for the Project Management Framework that serves as a starting point for creating something new. Templates provide consistency, reduces repetitive work, and ensures that crucial elements are not missed.
Waterfall	A sequential, linear project management methodology that consists of several discrete phases; no phase begins until the prior phase is complete, and each phase's completion is terminal. Waterfall management does not allow you to return to a previous phase.

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