Quick Reference Guide

BACKGROUND

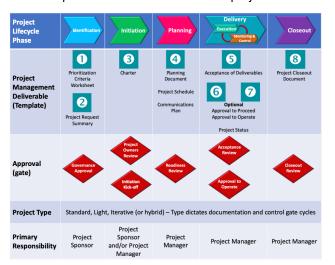
The following is a checklist of the items and requirements needed to navigate the Project Lifecycle.

Go to https://pmo.gmu.edu for additional information.

PROJECT MANAGEMENT FRAMEWORK

The Project Management (PM) Framework consists of:

- Project Types help determine and adapt to the needs of different projects
- Project Phases blocks of activities with their own purpose, deliverables, and required gates
- Project Gates formal key decision points required to move between phases
- Project Templates standardized forms that collect and report consistent data about the project



PROJECT TYPES

A method to account for varying approaches to project management, levels of uncertainty, etc.

- Standard the most common
- Light less planning and fewer control gates
- Iterative repetitive cycles required to deliver the final product

PROJECT PHASES



- 1. Identification capture the business need for the project and the ideal solution
- 2. Initiation document the project deliverables and resources needed to complete the project
- 3. **Planning** develop the project schedule, assign resources, clarify risks

- 4. **Delivery** do the project work (execution) and report on progress (monitor and control)
- 5. Closeout capture lessons learned and assess project successes for future use

PROJECT GATES

- Governance Approval approval of the business case and the ability to move from Identification to Initiation
- Project Owners Review and Initiation Kick-off- review and approval of the Project Charter and move from Initiation to Planning
- Readiness Review Review of the deliverables, plan, schedule, and resource needs and move from Planning to Delivery (Execution)
- Acceptance Review Acceptance of deliverables; move to Closeout if all deliverables are complete
- Approval to Proceed (optional) Capture key decisions for the project go/no decision points anytime during the project lifecycle
- Approval to Operate (optional) Approval to release deliverables to production during project lifecycle if necessary (e.g., software development)
- Closeout Review Final approval and closure of the project; releases project resources

TEMPLATES

The Mason IT PM Framework includes the following lifecycle templates as a means to satisfy the project management deliverables



Template	Phase	Overview
1-Prioritization	Identification	Captures the business case:
Criteria Worksheet		purpose, goals, benefits,
(PCW)		and costs
2-Project Request	Identification	Auto-generated report from
Summary		PCW
3-Charter	Initiation	Captures deliverables, team
		requirements, assumptions,
		risks
4-Planning	Planning	Identifies specific resources,
Document		schedule, work/effort, and
		refines assumptions, risks,
		and deliverables
5-Acceptance of	Delivery-	Approval documenting that
Deliverables	Execution	deliverable requirements
		have been met
6-Approval to	Delivery-	Approval to continue the
Proceed (Optional)	Execution	project on a specific path
		(go/no go approval)
7-Approval to	Delivery-	Approval to transition
Operate (Optional)	Execution	project deliverable(s) to the
		operational team(s)
8-Project Closeout	Closeout	Evaluation of project
Document		success, lessons learned
1	ı	1



PROJECT NAME	
PROJECT MANAGEMENT CHECKLIST This is a checklist of items for project managers to assist with tracking project management activities and complying with the PM Framework. <i>Note: Italicized</i>	 □ All Deliverable(s) Approved Date: □ Post Acceptance of Deliverables in Project Inventory OPTIONAL/FOR ITERATIVE PROJECTS
items are performed by the PPMO.	An 'Approval to Proceed' documents clear decision
ITS Project Inventory: https://epmo.gmu.edu/projectinv	points that keep the project moving forward or stops the project. It captures management approval of key decisions and next steps for projects within the
IDENTIFICATION (Portfolio Lifecycle Aware & Submitted) □ Complete Prioritization Criteria Worksheet (PCW) □ Submit PCW for Governance Approval □ Post PCW in Project Inventory □ Create Project Inventory Entry □ Request Reviewed by Governance Body	Delivery phase. ☐ Complete Approval to Proceed (Go/No-Go Decision point) ☐ Review Approval to Proceed with Sponsor/Approvers ☐ Receive Approval to Proceed ☐ Post Approval to Proceed in Project Inventory
☐ ITGG – Strategic or Capital ☐ ITS Senior Staff – Maintenance or Mandate ☐ PCW Approved ☐ Date:	OPTIONAL/FOR ITERATIVE PROJECTS An 'Approval to Operate' documents multiple releases or deliverables that are transitioned to
INITIATION (Portfolio Lifecycle Approved) ☐ Complete Project Charter ☐ Identify Deliverables ☐ Document Assumptions and Risks ☐ Select Resource Needs ☐ Complete Project Owners Review	operations at varying times. It allows portions of the project work to be considered complete even if all deliverables are not complete. ☐ Complete Approval to Operate ☐ Review Approval to Proceed with Sponsor/Stakeholders
 □ Receive Formal Start Work Order □ Complete Initiation Kick-off □ Project Charter Approved Date: □ Post Project Charter in Project Inventory 	 □ Receive Approval □ Move Approved Deliverable(s) to Operations □ Post Approval to Operate in Project Inventory □ DELIVERY - MONITOR AND CONTROL
PLANNING (Portfolio Lifecycle Active) Complete Project Planning materials Planning Document Project Schedule Communications Plan Conduct Readiness Review	 (Portfolio Lifecycle Approved) □ Update Project Status in Project Inventory □ Report Weekly Project Time/Effort by Team Members □ Prepare Regular Status Updates as Required by Senior Leadership
☐ Planning Docs Approved ☐ Post Planning Documents in Project Inventory	CLOSEOUT (Portfolio Lifecycle Active & Operational) ☐ Complete Project Closeout Document
DELIVERY - EXECUTION (Portfolio Lifecycle Active) ☐ Conduct Execution Kick-off Meeting ☐ Work Project Tasks Per Schedule ☐ Complete Project Deliverables ☐ Complete Acceptance Review (repeat as necessary for all deliverables)	☐ Conduct Closeout Review Meeting ☐ Closeout Doc Approved ☐ Date: ☐ Post Closeout Document to Project Inventory ☐ Complete FINAL project status update to designate the project as Operational/Closed Additional Information: https://pmo.gmu.edu

