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|  | **Department of Environmental Protection** |
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| **Project Management Standard for Vendor-Managed Information Technology (IT) Projects** | |

# Purpose

The purpose of this standard is to establish project planning and management requirements for projects that are wholly managed by information technology (IT) consulting firms or vendors. This standard shall be incorporated by reference into all IT procurement documents (request for quotes, contracts, direct orders, etc.) where external vendors are providing IT project management services.

# Scope

This standard applies to all IT projects, or projects that have a significant IT component that are wholly managed by IT consulting firms or vendors.

This standard does not provide explicit methodologies and processes for managing IT projects. Individual companies should have their own internal project management methodology and processes with which they are familiar. Project management processes may also differ depending on the specific IT product being developed. Therefore, this standard addresses only the baseline requirements that DEP, as the customer receiving the deliverables and services produced from a project, must receive.

# Standard

This standard adopts by reference the Project Management Institute’s (PMI®) Guide to the Project Management Body of Knowledge (PMBOK®) (2004). The PMBOK® is recognized by both the American National Standards Institute (ANSI) and the International Institute of Electrical and Electronics Engineers (IIEE) as an international standard for project management.

For projects that are wholly managed by IT consulting firms, this standard may be superseded by the firm’s internal project management standard. However, the use of an external project management standard must be addressed specifically in the associated contract language and must be mutually agreed to by DEP and the consulting firm and documented in contractual documents.

The following section identifies standard project management deliverables that shall be included in any such contract. Additional project management deliverables may be required, depending on the type, size, scope and complexity of the project. These project management deliverables are in addition to any product-specific deliverables being produced from the contract. For example, software requirements specifications, system design documents and test plans are typical product deliverables resulting from a software development project.

# Required Project Management Contract Deliverables

1. Project Management Methodology – Vendor must supply a summary of its Project Management Methodology to DEP for review and approval prior to contract execution. The summary must include, at a minimum, a sample copy of project management deliverables as well as those items that specifically address the business requirements. Any vendor-specific project management methodology must be consistent with the PMBOK®.
2. The Vendor must provide a **Project Management Plan** for the project, either before contract execution or as the first deliverable before any work is begun. The Project Management Plan and all associated documents shall become a part of the formal contract. This plan shall address the following elements at a minimum:
   1. **Scope of Work** – describe in detail what is in-scope and what is out-of-scope for the project.
   2. **Project Goals and Objectives** –document the specific goals and objectives that the project is meant to accomplish.
   3. **Project Performance Measures** – document the performance measures related to ongoing project progress. Describe how those measures will be monitored and reported on throughout the project lifecycle. At a minimum, these measures shall relate to scope, schedule and budget performance areas. Additionally, document any project performance measures that will be used to determine if the stated project objectives have been met by the close of the project. These measures should be specific, measurable and attainable within the project scope, time and budget.
   4. **List of Project Deliverables** – document a complete list of project deliverables, the specific deliverable acceptance criteria and review process. Deliverables must include both project management and product-specific deliverables.
   5. **Communications** – document the frequency, type and audience for ongoing project communications. This area shall include project status reporting, identify stakeholders receive communication, frequency of meetings and all other types of project communications.
   6. **Change Management** – document how change requests shall be initiated, documented, assessed, executed and tracked. This area shall also include what changes must be processed through the contractual change order process.
   7. **Project Schedule Management** – document how the project schedule will be managed and maintained. Project schedules shall be baselined at project start and then continually managed throughout project. If a change event results in approved changes to the schedule, the schedule must be re- baselined accordingly.
   8. **Budget Management** – document how budgetary changes shall be addressed and how the project budget shall be monitored and managed throughout the project. Any changes to the original budget baseline shall be managed through the documented change management process.
   9. **Quality Management** – document how project quality will be managed, deliverables are produced and what elements define quality in the project deliverables as well as project execution quality. Detail what specific quality processes shall be used to monitor and confirm the quality of project deliverables.
   10. **Risk and Issues Management** – document an initial risk management plan and describe how this plan will be monitored, maintained and acted upon throughout the project. All projects shall document, manage and report on issues and any risk events that are realized.
   11. **Human Resource (HR) Management** – identify required project resource skills and identify when they will be needed during the project. Projects shall clearly identify the roles and responsibilities of both the vendor staff and DEP during the project lifecycle. The Vendor must provide a qualified project manager to all project-based contracts. Specific experience and required roles for all project team members must be negotiated prior to contract execution and specifically included in the contract. The HR management plan must also address the process whereby team members will be replaced if needed.
   12. **Organizational Chart** – a project organizational chart must be included in the Project Management Plan. The chart must identify the named individual, the role they are filling and the time frame or project phases during which each individual/role will be required.

# Deviation from Use

Any deviation from use of this standard shall be approved by the DEP contract manager and documented in the associated DEP contract or direct order.

# Definitions

1. **IT Project** – a temporary endeavor, having a defined start and end date and resulting in a unique product or service dealing with an IT subject area. Projects have distinct teams of resources created specifically to conduct project tasks and generate deliverables. Repetitive operational or ongoing maintenance activities are generally not considered projects. Examples of IT projects include:

* Design, development and implementation of a software application
* Purchase and installation of a commercial software product
* Systems hardware and network installations, modifications or upgrades
* Planning, analysis and feasibility studies for IT projects

1. **Project Management Institute (PMI©)** – an international non-profit membership association for professional project managers. PMI is a standards-setting body for the project management profession.
2. **Project Management Body of Knowledge (PMBOK®)** – a compendium of project management fundamentals and best practices that apply to a variety of project types (software development, construction, engineering, etc.). The PMBOK® is an internationally recognized standard published by the Project Management Institute.
3. **American National Standards Institute (ANSI)** – a United States non-profit standards-setting body that oversees the creation, promulgation and use of thousands of norms and guidelines for a variety of industries, including information technology.
4. **International Institute of Electrical and Electronics Engineers (IIEE)** – an international, non-profit organization that is a leading developer of standards related to telecommunications, information technology and power generation products and services.

# Responsible Authority:

The Project Management Office in the DEP Office of Technology and Information Services (OTIS) is responsible for establishing and maintaining this standard.

# Bibliography

(2004). *A Guide to the Project Management Body of Knowledge (PMBOK®),3rd Ed., ANSI/PMI 99-001-2004.* Newton Square, PA: Project Management Institute/ANSI.

FL Dept. of Environmental Protection. (2009). *DEP Directive 370: Information Technology Resource Management.* Tallahassee: FL DEP.

**Approved by R. John Willmott, CIO 5/27/09**

**Approval Date**