



THE UNIVERSITY *of* NORTH CAROLINA
GREENSBORO
Information Technology Services

FastTrack Project Management Methodology



PM FastTrack Methodology

The division of Information Technology Services (ITS) at the University of North Carolina at Greensboro (UNCG) implemented its Project Management Initiative in 2001.

The general goal of the UNCG ITS Project Management Initiative is to serve the division of ITS and the greater UNCG client community by developing and maintaining a streamlined project management methodology which promotes opportunities for collaboration, innovation, and progressive solutions.

The UNCG ITS Project Management Initiative also aligns projects and priorities to the ITS Strategic Plan within a developing financial model.

The methodology governing FastTrack projects undertaken by UNCG ITS is outlined in this document. The FastTrack methodology is designed to lessen the administrative load for the Project Manager on small projects that will last no longer than 30 days, are expected to require 16 - 80 business hours of work time, and only require resources from one area of ITS.

Project work with an estimated duration longer than 30 days, a work time estimate greater than 80 business hours, or resources from various areas of ITS falls under the Full Project Management Methodology. The Full Project Management Methodology definition document can be found online at http://its.uncg.edu/Project_Methodology/Full_Methodology/. The Full Project Management Methodology definition document also outlines the governing authorities of the UNCG ITS Project Management Initiative as well as descriptions of project management reports generated by the PMO.

FastTrack Projects

A project is defined by the Project Management Institute (PMI) as "a temporary endeavor undertaken to create a unique work product, service, or result."

An UNCG ITS project can be classified as FastTrack if it meets the following criteria:

- Estimated completion time greater than two business days (16 business hours) and less than two business weeks (80 business hours)
- Completion date within 30 days of the initiation date
- Project team is composed of resources from one area of ITS. The exception is the inclusion of DBAs as resources, as long as less than two hours of their time is required.

If a proposed project fails to meet the three criteria above, it will be performed under the Full Project Management Methodology.

1. Project Statuses

A project will move through several statuses during its life cycle. The statuses directly relate to the frequency of reports required of the project manager and expected by the project stakeholders.

a) Approved

A FastTrack project is considered Approved after the PMO receives the 6-TECH ticket that proposes the project. The PMO will assign a number to the FastTrack and notify the Project Manager that the FastTrack is approved, and the Project Manager should start generating weekly reports on the status of the FastTrack.

b) Active

A project is considered Active after project documents have been completed by the project manager, reviewed by the PMO, and accepted by the client of the project.

c) Completed

A FastTrack project is Completed after the client has signed off on the final status report/change control form that states that the project is complete.

d) Cancelled

A FastTrack project is considered Cancelled when project work is halted. The most common reasons for the cancellation of a project are that the need or scope has changed in such a way that the project is either unnecessary or should be completely re-engineered. The decision to cancel a project can be made by the project Client, an ITS AVC, or by the ITS Vice Chancellor/CIO.

e) Held

A FastTrack project is considered Held when either the project Client or the ITS Vice Chancellor/CIO states that work on the project will be halted. Generally this occurs when there is a shortage in resource availability, and the intention is that work on the project will resume at a later date.

2. Roles

There are four roles that must be fulfilled in each FastTrack project.

a) Client

The Client of a project is the person who requests the project and is providing funding.

The Client of a FastTrack may also be an ITS manager.

Clients should receive weekly Status Reports from Project Managers.

(1) Responsibilities

Clients must review and sign a copy of the FastTrack Project Mandate before the project work can officially begin.

If the Project Manager finds it necessary to submit a Change Control form, the Project Manager must obtain the Client's signature on the form. This signifies that the Client has been informed of the changes.

b) Sponsor

The Project Sponsor is the advocate or "guardian angel" of the project. This is the person to whom the Project Manager goes for support or advocacy and must be in a position to solve and mediate any project obstacles. These could include negotiations to solve resource constraints, changes in project scope or taking problems higher into the leadership chain. Sponsors are included in all project reporting and planning.

The Sponsor is often the Project Manager's supervisor, but this is not a rule. The Sponsor should be the person best positioned to support/advocate the factors necessary for successful completion of the project.

(1) Responsibilities

The Sponsor resolves hindrances to the project that the project manager does not have the authority to solve, such as priority conflicts and resource acquisition.

c) Project Manager

The Project Manager is the person who is assigned to lead a project. Project managers are also the central communication hub between all persons who are involved in a project.

(1) Responsibilities

The Project Manager is the person responsible for all elements of planning, managing, and controlling the project. In other words, the Project Manager is responsible for bringing the project in on time, within cost constraints, and to technical specifications (to a given quality) with agreed upon resources.

The Project Manager's most critical tasks are maintaining the flow of communication between all project stakeholders and the resolution of problems that impact the work of the project.

d) Resource

A Project Resource is a person who will be performing work on a project at the direction of a Project Manager.

The participation of a Resource on a project must be confirmed by the Resource's supervisor.

Resources should receive weekly Status Reports from their Project Manager.

(1) Responsibilities

Project Resources are responsible for completing project tasks to which they are assigned in a timely manner and to the best of their ability. Resources are also responsible for advising the Project Manager on the status of their tasks.

3. Project Process

a) Initiation

(1) Request Submitted by UNCG Faculty and Staff

A majority of project requests are handled through ITS's 6-TECH system. UNCG employees who have a request to make of ITS are directed to call the Technology Service Center (TSC) by calling 6-TECH or emailing 6-tech@uncg.edu.

UNCG faculty and staff also request projects through the UNCG Administrative Systems Committee and the ITS-MIS online service request system.

Projects are defined as unique work products that have a definite start and end date, and are estimated to take longer than two business days to complete. Thus, a project request will make its way through the 6-TECH system to the area of ITS that is able to fulfill the request.

From the group to which the request applies, the ticket will be brought to the attention of the associated Assistant Vice Chancellor (AVC). ITS staff who acquire the ticket under the 6-TECH system may directly contact their AVC to discuss it, or they may send the ticket to the PMO first.

If the PMO receives the ticket prior to the AVC, the PMO will bring the ticket to the attention of the relevant AVC.

Once the AVC has looked over the project request, the ticket is forwarded to the PMO 6-TECH queue. At this point the project request is entered into the Project Management Database, and it is given a project number. The person who requested the project is now the project Client. If the project request falls under the parameters of a FastTrack project, the PMO will set the FastTrack's status to Approved and notify the Project Manager that work and weekly reporting on the project should begin.

(2) Request Submitted by ITS Staff

In the case of projects requested by ITS staff, the project request is usually made by a manager or the designated Project Manager. Typically, the Project Manager's supervisor becomes the client or sponsor.

b) Planning

A FastTrack project enters the planning stage of its lifecycle once it is submitted to the PMO as a Remedy (6-TECH) ticket.

(1) Project Team

The Project Manager will work with his or her project team to develop the document that defines the FastTrack project - the FastTrack Mandate.

(a) Creation of FastTrack Project Mandate

By this point, the Project Manager knows the following details of the project:

- Project Title (originates from the 6-TECH ticket requesting the project)
- Project Number (assigned by the PMO)
- Submittal Date (date the 6-TECH ticket requesting the project was submitted to the PMO)
- Identity of the Project Manager (determined by a member of ITS management)
- Client (person who requested the project)
- Sponsor (the Project Manager's supervisor)
- Performing organization (the area of ITS that is performing the project work)
- End Date (date project is expected to end - should be no longer than 30 days after the submittal date)
- Work Start Date (date that project work begins)
- Resources (the names of the project team members, determined by the Project Manager's supervisor)

In meetings with the project team, the Project Manager needs to gain enough information to fill out the remaining fields on the project mandate form:

- Goal Statement and Suggested Resolution
- Project Objectives
- Task List and Schedule
- Performance Constraints
- Costs

- Special Authorities Required
- Assumptions
- Activities Out of Scope

To formally submit the mandate for review by the PMO, Project Managers submit the mandate to a folder in the PMO Novell space. It is located at *N:\ITS\project management office\Public Share\SubmitProjectDocumentsHere*

The file name of the mandate should be in this format:

project number-project manager's last name-project title

Ex: *200-Wyatt-EmailImplementation*

(2) Project Manager

The Project Manager is responsible for weekly status reports on a FastTrack project.

(a) Status Reports

While the FastTrack project is classified as Approved, the project manager must complete weekly status reports and provide them to the project stakeholders (Client, Sponsor), all members of the project team, and the PMO.

Copies of the status report form are located in the PMO Novell space at *N:\ITS\project management office\Public Share*

Status reports should contain a complete summary of project work and hindrances since the last status report.

Status reports should be emailed to the project client, sponsor, and all members of the project team.

A copy of each status report should be submitted to the PMO. When the FastTrack project became Approved, the PMO created a folder for it in the PMO Novell space. While the project is classified as Approved, the project folder will reside within the Approved folder, which is located here: *N:\ITS\project management office\Projects\Approved*. Each Approved project has its own folder. Inside each project folder is a folder called *StatusReportChangeControl*. The project manager should submit status reports to the project's *StatusReportChangeControl* folder weekly.

c) Communication

The Project Manager functions as a communication hub between all persons involved with a project.

Meetings and correspondence via email are commonly used methods of communication between project stakeholders and the project manager, and within the project team.

There are three types of documented communication that the Project Manager is required to complete. The goal of these documents is to ensure that all stakeholders and resources are well-informed about the project.

(1) Project Manager

(a) Status Reports

The Project Manager must complete weekly status reports and provide them to the project stakeholders (Client, Sponsor), all members of the project team, his or her immediate supervisor, and the PMO.

Copies of the status report form are located in the PMO Novell space at *N:\VTS\project management office\Public Share*. Status reports should contain a complete summary of project work and hindrances since the last status report.

Status reports should be emailed to the project Client, Sponsor, and all members of the project team.

A copy of each status report should be submitted to the PMO. While the project is classified as Active, the project folder will reside within the Active folder, which is located here: *N:\VTS\project management office\Projects\Active*.

Each Active project has its own folder. Inside each project folder is a folder called StatusReportChangeControl. The Project Manager should submit weekly status reports to the project's StatusReportChangeControl folder.

The PMO monitors each project's StatusReportChangeControl folder to ensure that Status Reports are created and placed within it weekly. The absence of a Status Report in the StatusReportChangeControl folder results in the appearance of the Project Manger on the Non-Compliance Report.

(b) Change Control

If one or more of the following events occur, the Project Manager must submit a Change Control.

- Change in Stakeholder(s)
- Project end date adjustment
- Original Mandate scope change
- Human resources adjustment
- Costing modification
- Change in project Status

The form for the FastTrack Change Control is the same as the Fast Track Status Report form. The form is located in the PMO Novell space at *N:\VTS\project management office\Public Share*.

There are additional sections on the form that must be filled out to qualify the report as a Change Control. The project manager also must obtain a signed copy of the Change Control and submit that copy to the PMO for archiving.

The Project Manager sends copies of these reports to the project Client, Sponsor, the entire project team, and his or her immediate supervisor.

The Project Manager must also submit a copy of each status report to the appropriate project folder in the PMO Novell space.

The PMO monitors each project's StatusReportChangeControl folder to ensure that Change Controls are created and placed within it as necessary. If one of the conditions for Change Control occurs and there is no Change Control form in the folder, the Project Manager will appear on the Non-Compliance Report.

(2) Project Team

The members of the project team should keep the Project Manager informed on the progress of their assigned tasks. Events that impact the project timeline should be brought to the Project Manager's attention immediately.

d) Closure

FastTrack projects must be officially closed, and the Client must sign the final Status Report/Change Control form indicating that they have received the work product of the project.

(1) Change Control

Every project will have at least one Change Control because a Change Control is required to change the status of the project from Active to Completed, thus formally ending the project.

The Project Manager should complete the final Status Report/Change Control form. On this report, the Project Manager should check the box indicating that this is the final report for the project.

The Project Manager must have the Client sign this Change Control and submit the signed copy to the PMO for archiving.

Electronic copies should be sent to the Client, the Sponsor, the entire project team, and the project manager's immediate supervisor.

A copy of this report must also be placed in the project's StatusReportChangeControl folder within PMO Novell space.

4. Project Documents

FastTrack projects are defined solely by the FastTrack Project Mandate. A WBS is not required for FastTrack projects.

a) Mandate

The FastTrack project Mandate is a document that sets the conditions, resources, and objectives of a FastTrack project. The project Client must sign the Mandate indicating that they agree with its parameters before the project becomes classified as Active and project work begins.

The UNCG ITS project Mandate is a Word template that can be found in the PMO Novell space at *N:\VTS\project management office\Public Share*.

(1) Creation

The Project Manager begins to work on the FastTrack mandate after the Magic ticket proposing the work has been submitted.

By this point, the Project Manager knows the following details of the project:

- Project Title (originates from the 6-TECH ticket requesting the project)
- Project Number (the PMO gives the project number to the Project Manager after processing the 6-TECH ticket)
- Submittal Date (date the 6-TECH ticket was submitted)
- Identity of the Project Manager (determined by ITS manager)
- Client (person who requested the project)

- Sponsor (the Project Manager's supervisor)
- Performing organization (the area of ITS to which all resources belong)
- End Date (date project is expected to end - should be no longer than 30 days after the submittal date)
- Work Start Date (date that project work begins)
- Resources (the names of the project team members, determined by the project manager's supervisor)

In meetings with the project team, the Project Manager needs to gain enough information to fill out the remaining fields on the project mandate form:

- Goal Statement and Suggested Resolution
- Project Objectives
- Task List and Schedule
- Performance Constraints
- Costs
- Special Authorities Required
- Assumptions
- Activities Out of Scope

(2) Document Conventions

The PMO looks for adherence to the following conventions before accepting a project mandate, thus making the project status Active.

(a) Project Title

- The project Title is acquired from the initial 6-TECH ticket that requested the project

(b) Project Number

- FastTrack projects are assigned a number by the PMO

(c) Submittal Date

- The Submittal Date is the date the 6-TECH ticket requesting the project was received by the PMO.
- The date format is month day year, e.g. December 12, 2004.

(d) Project Manager

- The Project Manager should list his or her full name

(e) Client

- The Client is the person who requested the project work. His or her name appears on the 6-TECH ticket that is the project request.
- There should only be one Client.

(f) Sponsor

- The Sponsor will usually be the Project Manager's supervisor or another ITS leader.
- List the Sponsor's full name.

(g) Performing Organization

- The Performing Organization will be the ITS area that is performing the work on the FastTrack

(h) End Date

- A date must be given; this field cannot be listed as "TBD." If the end date changes in the course of the project, it can be remedied with a Change Control form. (However if the End Date should not be longer than 30 days from the Work Start Date.)
- The format should be month day year, e.g. September 23, 2005.

(i) Work Start Date

- The date that the project team will begin to work on project tasks other than the initial planning tasks, i.e. the tasks that will directly result in the completion of project objectives.
- The format for the date is month day year, e.g. January 4, 2005.

(j) Goal Statement and Suggested Resolution

- Provide a strong goal statement first, giving a clear and factual description of the project work.
- The nature of the work should be clearly stated: if the project is research and development, analysis or implementation- type work.
- Then follow with important historical or background information about why the work is important or necessary.
- This should not be lengthy but kept as brief as possible.
- Spell out all acronyms upon first use.

(k) Project Objectives

- Objectives should reflect high-level outcomes that the Client wants from the project.
- Objectives should be SMART: Specific, Measurable, Achievable, Realistic, and Time-bound.

(l) Task List and Schedule

- In the table, list tasks based on the Objectives and provide time estimates for each task.

(m) Performance Constraints

- Performance constraints are known issues, deadlines, etc. that must be accounted for in the work plan.
- Performance constraints are put in place by the Client.
- Performance constraints are often also Assumptions and if so, they can appear in both places on the mandate.

(n) Costs

- "Staff Time" should always be listed as a Cost to denote ITS human resource time.
- If other concrete costs are known or required such as the cost of hardware, software, or consulting time, those costs should be listed in the Costs field as well.

(o) Resources

- Resources refers to human resources.
- All Resources should be listed by full name, ITS area (or department for non-ITS resources) and job title.
- The job titles of ITS staff are available in the PMO Novell space at *N:\VTS\project management office\Public Share*.

(p) Special Authorities Required

- List persons external to the project who will need to authorize activities impacting the project.
- List each Authority by full name and job title
- Examples of events requiring Special Authorities include: travel expenses, legal consultation, and budget authorization.
- List the Critical Events Calendar if outage notifications must be sent to it as a result of project work.

(q) Assumptions

- Under the Assumptions field, list assumptions that the Project Manager and Client believe to be true about project variables.
- Assumptions are conditions that will impact the project if they turn out to not be true, e.g. a piece of software needed for the project does not arrive on schedule.
- Assumptions often mirror Project Constraints.
- Even if something appears obvious, it should be spelled out in the Assumptions field to ensure that the Project Manager and Client understand conditions that affect the project.
- An example of an Assumption: "The Magic development server will be operational and available by June 1, 2003."

(r) Activities Out of Scope

- The first item under Activities Out of Scope is required on all project mandates. It is "Any work not specifically defined in the scope of this document will be considered as 'work or activities out of scope' and can only be included via the change control process."
- Activities Out of Scope clarify the boundaries of the project by specifying what work will not be done.
- It is critical to define Activities Out of Scope in order to forestall "scope creep," or expansion of the original project goals beyond what was originally defined and planned.

(s) Reporting

- The Project Manager is responsible for weekly reports on the FastTrack project from the date the PMO tells him or her that the 6-TECH ticket proposing the project has been processed.
- The Project Manager should state his or her name reporting to the names of the stakeholders (Client, Sponsor, project team), and the Project Manager's immediate supervisor if he or she is not already listed as a stakeholder.

(3) Submittal Process

To formally submit the mandate for review by the PMO, Project Managers submit the mandate to a folder in the PMO Novell space. It is located at *N:\VTS\project management office\Public Share\SubmitProjectDocumentsHere*.

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