

What is an IT Project?

The purpose of this document is to provide guidance to staff on the definition of a project, when formal project management is required, the process to get a project started, and the work efforts that are excluded from the definition of a project.

What is a project and what does managing a project include?

Per the Project Management Body of Knowledge (PMBOK®), managing a project includes:

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

The PMBOK® states, “**a project is 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 number of people, supplies and capital. Project characteristics include:

- Accomplishment with shared resources often only available on part-time basis
- Cross-functional team work may be required
- Uncertainty and potential change during execution
- Changes to the way the business operates
- Specific deadlines, time and resource constraints.

So how is a project defined and what endeavors would be deemed a project and therefore managed under the Enterprise Project Management Office (EPMO)?

The following efforts would be deemed projects and require EPMO oversight. Typically, these efforts involve providing an IT service to citizens, businesses, employees or providing a method for an agency to improve services or be more efficient at providing services.

- New technology purchases and implementation regardless of cost (e.g. new business application)
- Development and establishment of new IT service offering (e.g. ITSM/ITAM, CRM, Cisco telephony)
- Development and establishment of new capabilities
- Generally, feasibility studies and proof-of-concepts are projects
- Generally, procurement using the RFP process for IT Technology or Services are projects
- Outsourcing of business functions to a vendor that includes IT systems may be a project
- IT Reserve Fund Spending

Application updates to maintain industry compliance will be considered on a case by case basis.

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How do operational efforts and projects differ? According to PMBOK:

- ✓ The purpose of a project is to attain its objective and then terminate.
- ✓ The objective of an ongoing operation is to **sustain the business.**” Ongoing operations involve permanent or semi-permanent functional work to repetitively produce the same product or service.

An example of ongoing operational work would be the on-boarding of a customer to O365 for e-mail and calendar or to Remedy for IT service management. The O365 and Remedy teams have a defined process for on-boarding customers to their service offerings. The actual development of the service offering, including the testing of procedures for on-boarding customers was a project.

In order to help identify operational efforts from projects, we have gathered information regarding efforts that would not be considered projects. These examples include:

- 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 use of Nexuss technology)
- Software or technology upgrades **except** where the upgrade is a major release that adds additional functionality and requires more extensive testing and coordination with the customers directly or indirectly utilizing the software
- 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
- Process / procedure updates
- Database reorganizations and general house-keeping
- Business process re-engineering that changes process but not technology

What if you are unsure if your planned work is operational or a project and you need Project Management Office (PMO) involvement?

We will continue to build the exclusion list as examples are identified. However, if **any** or **several** of the following statements below are true, we would recommend you contact your Project Management Advisor, to assess whether a project is required or not.

- There is significant risk involved with the effort
- It requires a cross-functional team
- The delivery is time critical for the business

What is an IT Project?

- There is significant need for communication
- The agency does not have a project manager resource
- If it is an initiative in your agency's IT or Business Strategic Plan

The Touchdown Project Management System has the ability for you as a project manager to create Enterprise Projects and leave them in the Business Concept stage until you can better determine if the project is "Lite", "Enterprise" or "Administrative" project. The EPMO recommends this method so you have a head start in gathering data that may be required for future approvals. You also have a go-to place to store project documentation and other artifacts.