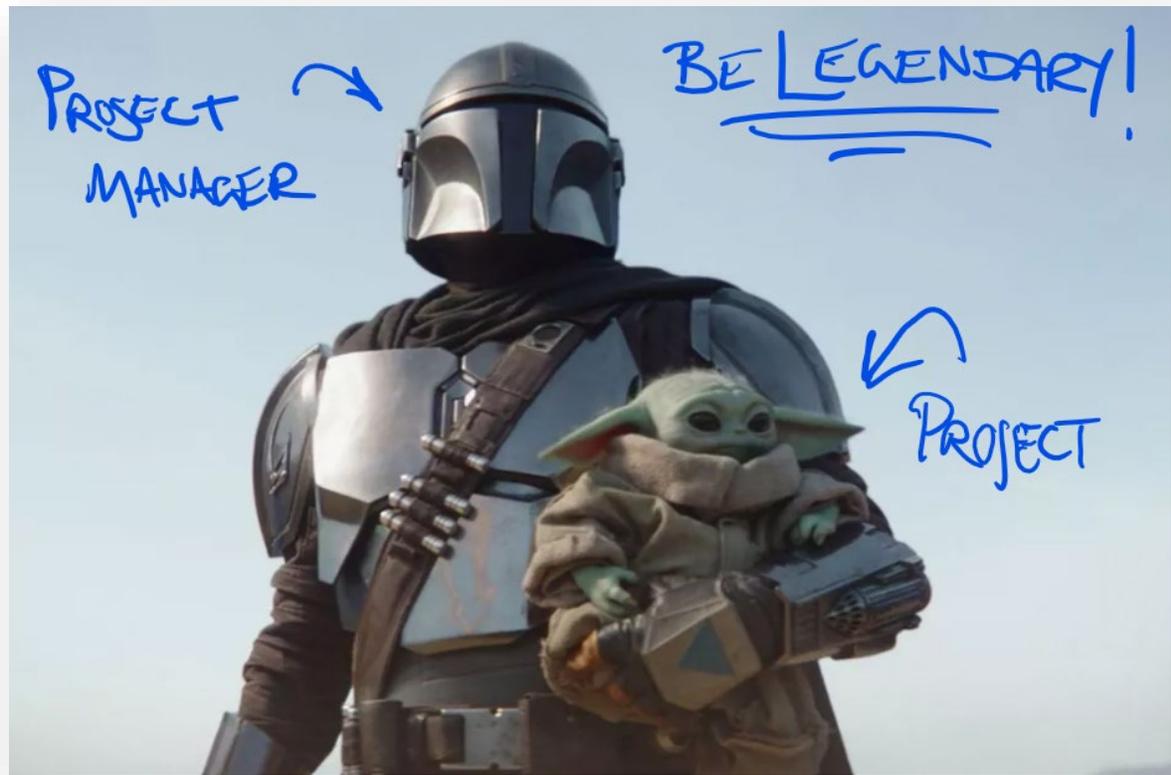


The Way of the PMO



This **QUICK START GUIDE** is intended for anyone managing an IT project for North Dakota state government.

It will help you:

- Manage the project yourself if it is a smaller initiative
- Offer you tools, templates, and a basic process you should use to do this*
- Understand when you need to request additional assistance from the NDIT Project Management Office (PMO)



() When I say "should," I mean that you need to follow this path. It is important for us to be aligned in our ways. I will help you. ... I have spoken.*

– Kuiil, Ugnought and master project manager

Background

An operational assessment was conducted at the end of 2017 to assess the capability/maturity of core NDIT service areas. The project management office was one of the areas assessed. Among the improvement recommendations for the PMO was what we affectionately called, “Project Management for Everyone.”

Specifically, the recommendation stated that NDIT needs a flexible, consistent project methodology that is followed by all.

Since then, the PMO has implemented tool, template, and process updates that may be leveraged by all project management skill levels (everything from “I don’t do project management,” to, “I read Project Management Institute research for fun.”)

This guide is intended to help anyone who needs to manage an IT initiative. In other words, you need to get things delivered using a sensible, scalable, and standardized State of ND approach.

That stated, are you a business analyst, business analyst account manager, business application support manager, businessperson, administrator, developer, technologist, or aspiring project manager? Or anyone else interested in delivering success?

Great! Let’s saddle up and ride on!



A Quick Note About Laws and Standards

Laws are the system of rules, or statutes, made by a government. They are enacted by a legislative body and signed by a ranking official (such as a governor).

Standards are created by certain state agencies in the interest of “making things work,” by providing guidelines or requirements on how things are done. Certain laws state that certain agencies shall create standards on certain topics.

A number of ND state laws specify requirements for how IT project management shall be performed at the state ([see this page for an overview](#), if interested). NDIT also has created a [project management standard](#) that further elaborates on what needs to (or rather, shall) be done to meet the requirements of the laws. (Please note that “shall,” in legal terms, means that it is mandatory under the laws that guide our government work.)

Now the happy part of this story is that you do not need to read the laws and standards that pertain to project management. The guidance in this document tells you what you need to do related to any project management laws and standards.

The other happy part of this story is that if doing any of the items prescribed in this guidance makes you uncomfortable or irritated, you now have a wonderful opportunity to practice your growth mindset because the project management laws and standard say that you shall do these things.

Before We Begin: How big is this gig?

Because laws affecting how projects are managed in North Dakota state government are related to the cost of the implementation, the first thing you need to do is assess how much you think your project will cost. If you don't have a real estimate, just go with your gut.

- Does it, or will it, cost \$0 to \$99,999?
(or do you think it will take under 1,000 hours of labor to complete?)
 - [Proceed to Option 1](#)

- Does it, or will it, cost \$100,000 to \$499,999?
(or do you think it will take between 1,000 and 4,999 hours of labor to complete?)
 - Proceed to Option 2

- Does it, or will it, cost \$500,000 or more?
(or do you think it will take 5,000 hours or more of labor to complete?)
 - Proceed to Option 3, and/or contact the NDIT Project Management Office

Please note that for a "Software as a Service" type of project, the project office considers the cost to implement, plus one year of maintenance, the true cost of the implementation. This provides a more accurate gauge of the complexity of the work for SaaS solutions.

Option 1: \$0 to \$99,999

These are what we'd call small projects or initiatives. Although topping out at just under \$100,000 (which, yes, is a lot of money), or roughly 1,000 hours or so of effort depending on the math, they typically have a complexity level that anyone – including you! – can manage if approached the right way. What way is that?

The Way of the PMO.
 (Helmets optional).

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Please proceed.



Summary/Quick List:

Below is a summary of all the steps and key activities you would do to manage this size project. You may also use this as a quick checklist to make sure you're doing the right things.

	The name of the project is:
	Who is fulfilling the Project Sponsor role?
	Who is fulfilling the Project Manager role?
	Do you have a budget?
	Do you have authorization to do this work?
	Is there an initiative intake form for this work (IT only)?
	Is there a procurement? And if so, are you familiar with state procurement laws?
	Set up your project document repository, and be prepared for records retention requirements
	Prepare the appropriate Project Charter/Project Plan Template
	Set up your project tracking tool/method
	While you work the work and deliver the results, communicate frequently, track status, document key items, and perform change management activities
	Close it out
	Celebrate!

Step 1: Understand This

A project is TEMPORARY in that it has a defined BEGINNING and END.

A project has defined SCOPE and RESOURCES.

A project is UNIQUE, in that it is not a routine operation.

A project is being done to achieve a specific GOAL (or set of goals).

A project often includes a TEAM of people who don't usually work together.

PROJECT MANAGEMENT is the application of knowledge, skills, tools, and techniques to deliver something of value to people. (Ref. [Project Management Institute](#))

And to top it off, per the ND State Standard for Project Management, "Projects are defined as a temporary endeavor undertaken to create a unique product, service, or result, that is 80 hours or more of work. Due to the nature and scale of the projects defined as IT projects, it is critical that project management practices be employed and that processes are in place, increasing the probably of delivering quality products on time and within budget."

>> Now, ask yourself, is your project really a project? <<

If you said yes, please proceed.

If you said no, then perhaps this is an operational item that would be managed through a normal operational process (e.g., Scrum Team, Team Leader, etc.).

But what if it is operational or maintenance, but it is complex, or large? Good question – if you have a situation that would benefit from being put through the discipline of formal project management, then you should structure the work as a project.

If you are UNSURE, please contact the project management office to discuss.

Step 2: Do You Have a Project Sponsor?

A project sponsor is the person who has overall accountability for a project. They ensure that the project delivers on agreed upon business benefits. They provide business context, resources, and subject expertise. They also champion the project, helping to ensure it gets done and its benefits are realized. (On scrum teams this can often be the Product Owner.)

Now that you know what a sponsor does ... does your project have a project sponsor?

NOTE: A sponsor is a ROLE. Anyone can be a sponsor. You can be an accountant, and also serve as a project sponsor. Project Manager is also a ROLE. Anyone can be a project manager. For a project of this size, the sponsor and the project manager could be the same person as well. (Not recommended for bigger projects, however.)

If you said yes, please proceed.

If you said no, then please go find one before you do anything else.

Step 3: Do You Have a Budget? And Do You Have Appropriate Authorization to Do This?

Sometimes projects are just work done by FTEs, so there is no visible budget – the cost is the work effort which is paid for through a normally budgeted paycheck. But depending on who is doing the work, the project sponsor (or other business owner) will need to pay for that resource's work. As well, if anything is being purchased, there is a cost for that.

While we're on this topic, it is typical that the authorization to work on a project is tied to availability of funding. Therefore, has the appropriate unit lead, program lead, executive manager, or other decision maker prioritized and/or authorized this work?

Do you know if there is adequate funding available, and the appropriate authorization in place to start your project?

If you said yes, please proceed.

If you said no, then please go talk to your sponsor to determine if money needs to be spent, if you have any of said money available, and to ensure this is priority/authorized work.

But what if they know they will have money but don't know how much yet? Go ahead and begin, but make sure you get it figured out soon.

Step 4: Is There an Initiative Intake Request for This Work?

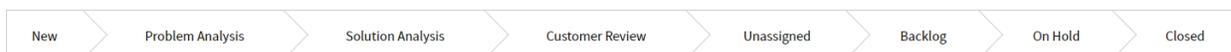
"Initiative Intake" is a process through which NDIT and/or agency staff preparing to conduct an IT project (or project utilizing NDIT staff) develop and/or review its business case and high-level technical concepts (when relevant) so NDIT staff can understand:

- The business drivers that are necessitating the work
- The work's impact to the state's enterprise technology architecture
- The work's impact to the state's security posture
- The work's impact to existing technology contracts and to ensure procurement best practices are followed
- The work's need for project oversight
- The work's need for business, technical, and change management resources
- Potential technology solution options
- Other potential benefits and risk factors related to the work

For any type of work request that is related to starting up (or deciding if you need to start up) a new IT project, a new business/process analysis, or the need for IT strategic planning, you need to ensure that someone (usually a business owner) has filled out an [Initiative Intake Form](#) through the state's [self-service portal](#).

This submission also ensures that staff may be activated across NDIT to engage on the work, and that the work will begin showing up in demand management and work status dashboards.

For reference, there are various stages an intake item may go through to become an active project. You may apply some project management discipline to anything you know is going to become a real/approved/funded/prioritized project at any stage listed in the graphic below. Or, you may just first hear about it when it hits the "Backlog" stage. Either way, if it is in "Backlog," and nobody knows what it is, then it is time for project management. In most cases, project manager assignments will be issued during this stage.



Step 5: Might There be a Procurement Involved in This Project?

If you said no, please proceed. (We mixed up the yes and no order of things here, did you catch that?)

If you said yes, then read the following and heed the direction. If you do not, then you may break your project before you even begin.

Do not, by any means whatsoever, think for one moment that you have any idea what to do to procure anything at the state of ND unless you have taken the state’s procurement training courses. The state has unique procurement laws. They are not the same as the federal government’s laws. They are not the same as private sector practices. Therefore, you should not make any recommendation to anyone at the state regarding what to procure, or how to procure it, unless you have taken the training, and/or you are doing so under the guidance of a state procurement officer.

To ensure fairness in the purchase of goods and services, all IT procurements of \$25,000 and up must abide by very specific practices, and it must be reviewed and approved by NDI’s procurement officer. The sooner you get that resource involved the better off you will be.

Step 6: Set Up a Project Document Repository

Projects require team collaboration, and documentation. To allow for both within our digital world, the PMO suggests you set up a Microsoft Project Teams space. You can use this Teams space to collaborate electronically, and to store your project documentation. (MS Teams is a statewide technology platform and is part of the Office365 set of productivity tools. You have access to this versatile and universal productivity device.)

To set up a new Team, fill out an [Email/Collaboration Tools service request](#).

To learn more about Microsoft Teams, see this [Work From Home with Office 365 tutorial](#).

Please keep in mind that as projects are UNIQUE and TEMPORARY, their documents are temporary, and are subject to records retention laws. To comply with records retention, project records must be deleted or destroyed three years after the project has been completed (note: certain agencies may have a different retention schedule than the general project schedule mentioned here). Anything you may need to keep permanently for operational purposes should be copied elsewhere before deleting the project repository. (Ref. [record series 801201 – Project Documentation](#)).

Step 7: Plan It

Go to the [NDIT Project Management Office web site](#), expand the “Project Management Templates” area, and download the “[Project Charter-Plan COMBINED – under \\$100,000](#)” Template.

Projects under \$100,000

- [Project Charter/Plan COMBINED Template](#)

Save the template in your document repository.

This template is a simple 1-page document designed for use on projects under \$100,000 in cost, and to be created by staff of any background (with or without project management experience). Even a Scrum team can utilize this template to help establish scope around a more complicated delivery or release. By stepping through the template and filling in the contents you will work with your team to define the business parameters and goals of your project, and then define key management guiderails such as scope, budget, and schedule. There is italicized/blue text throughout the document that will guide you on your way.

Step 8: Track It

At this level of project complexity, you may choose various tools to track your work activities. NDI has three core systems for tracking work – Azure DevOps, Service Now, and Microsoft Project Online (also known as NDVIEW). If your team regularly uses one of these, excellent! However, projects at this level, and especially those being performed outside of NDI, have the flexibility to use various tracking tools.

Before you roll your eyes – please know that if you want your project to get done within scope and time parameters, you need to define, at a minimum, your primary work activities, and you need to keep tabs on them. Here are some recommendations of tools available at the state that can help you.

“Microsoft Lists”

You can add a “Tab” to your project Team that is a Microsoft List. Lists are a great way to track work. In fact, there is a “Work Progress Tracker” list template. You can assign people and status to the work items and the assignments will show in various ways throughout the Office365 suite of tools. Because Lists are essentially SharePoint lists, work may be imported from or to Microsoft Excel as well, and also easily exposed on dashboards via PowerBI.

“Microsoft Milestones App”

You can add a “Tab” to your project Team that is a Microsoft Milestones app. The Milestones app for Microsoft Teams provides a simple way to keep track of your projects and initiatives.

Benefits of using the Milestones app:

- Managers can easily set up projects, and work items.
- Assign work items to employees.
- Classify work items by milestones.
- Configure work item categories, priorities, and status options.

The Milestone app is built on the Microsoft “dataverse” which means that data should be able to be extracted for other presentations. However, it is a new tool of which we don’t know too much about yet.

“ServiceNow Visual Task Boards”

Many agencies have access to ServiceNow, which is the state’s enterprise service desk system. This system has many uses, including incident management, request management, and some work tracking features. Anyone with access to this system can create a “Freeform Board,” that they can use to track

project work. For information on how to establish and use a Freeform Board, please view the [ServiceNow user guide](#) (see the visual task boards section).

“Azure DevOps”

Azure DevOps is a tool built with software development teams in mind. It supports them in the planning of work, definition and tracking of requirements, collaboration on code development, and the build and deployment of software applications. Azure DevOps is built around the capability to visually manage work via task boards, and it also instinctively supports the Sprint-based cycles of Scrum teams. All of that aside, it may also be used by any work team to develop a “backlog” of activities that may be managed through different visual presentations. Like ServiceNow, many agencies have access to Azure DevOps. To request access or other information regarding this tool, please submit an [Email/Collaborations Tools Request](#) in the ND Self Service Portal.

How about “Microsoft Planner”?

Planner is a cool little tool, but unfortunately it is a black hole when it comes to extracting data. Information in Planner cannot be reported on using any data connection tools. For this reason, we recommend that you do not use Planner (one exception being if it is used in conjunction with an NDVIEW/Project Online plan for projects over the \$100,000 threshold). As well, it is acceptable to use Planner to track the finer details of anything that is formally being reported on through either Azure DevOps, ServiceNow, or NDVIEW.

If you are a Gantt chart nerd and would like to use a more advanced planning tool such as Project Online (our enterprise implementation of Microsoft Project), please contact the PMO.

Step 9: Deliver It

At this level of project complexity, the formality of the tracking and management is up to you. That said, the following are some recommendations for project management activities you should perform to keep your project moving forward on track.

- Conduct regular status meetings
 - Some teams may be “Scrum” teams. That’s great, follow your usual ceremonies
 - The PMO will recommend a minimum of a weekly project team meeting during which the core team gathers to discuss issues, roadblocks, asks each other for assistance, and of course provides status updates
 - Keep track of the status. Update your lists, task boards, schedules, or whatever you are using to keep things in line
- Set agendas and keep minutes
 - To keep your meetings efficient and on track, as well as to be able to remember what happened last time, the PMO recommends setting agendas and keeping minutes
 - OneNote is an excellent tool to use for this. In fact, when you set up your MS Teams space a OneNote is automatically established in that Team
- Decisions
 - Whenever a key decision is made, write it down. People are busy, and they forget things. Sometimes they change their minds or didn’t understand the decision in the first

place. To avoid confusion and conflict, write these down and have the team agree on the written word

- Changes to Scope
 - Project scope can change, and often does, therefore any changes to scope should also be written down
 - The PMO has a [template for tracking these](#)
 - At this level of complexity, you could leverage a less complicated writeup in your OneNote notebook, but still check out the template to get an idea of what you should be thinking about keeping track of
- Communications
 - Good project management is dependent on good communications
 - Therefore, discuss project information with the team regularly. Be open and honest, and be respectful
 - Take a little time to think about the various communications channels there are on the project – who do you need to provide status to, how do you do that, how frequently?
- Organizational change management
 - Think about the impacts to the change your project is introducing to the people affected by it
 - Have you made them Aware of what is changing?
 - Have you told them why the change is important so they will Desire the change?
 - Have you provided them with the Knowledge they need to be successful through the change? (e.g., is there a new skill required?)
 - Have you ensured that those affected have the Ability to make it through the change? (e.g., basic training, revised process, or governance?)
 - Is there a plan to sustain the change through Reinforcement? (e.g., how are you going to check back in, and what are you going to do to make sure the change sticks?)
 - *You just read about the ADKAR model for change management. If you'd like to learn more, please see the state's change management curriculum in the PeopleSoft enterprise learning management system*

Step 10: Close It

When all the work for the project has been completed, conduct a closeout meeting (also known as a retrospective). At this meeting the team should talk about (and document) lessons learned, successes, and any other key points that are deserving of some reflection.

Once this is documented, you can take care of the document repository. Additionally, you can formally release team members from the project, and decommission any temporary access to any systems or files that was granted to anyone.

Are you ready to walk away now? Not quite yet.

Step 11: Celebrate!

Do something, anything. Even if it is just wrapped into your closeout meeting.

Congratulations, now you're done. Time to find your next project!

Option 2: \$100,000 to \$499,999

This tier coming soon!

Will include more greatest PMO hits from the PM Standard describing required use of NDVIEW, our project checklist, and scheduling best practices.

Option 3: \$500,000 and Up

This tier coming soon!