

## South Carolina IT Project Management Office – Executive Summary

As the benefits offered through the use of project management became more apparent to public and private institutions, governmental entities throughout the State of South Carolina were faced with the challenge of determining how best to implement the approach on a statewide level.

In 2002, The South Carolina Budget and Control Board's Division of the State Chief Information Officer (CIO) responded to the challenge by creating the South Carolina IT Project Management Office (PMO).

Since its inception, the PMO has functioned to support government entities in implementing project management practices through the:

- Development of a project management methodology
- Establishment of training and certification programs
- Creation of reporting requirements for various project types
- Dissemination of information resources to support "best practices"
- Development of a highly trained project management staff
- Support of forums, committees, meetings and organizations

The PMO has made significant progress for the citizens and government of the State of South Carolina by establishing and participating in:

- A project management methodology for use by all state agencies including policies, templates, metrics, dashboards and reporting requirements to facilitate cooperation, coordination and sharing of resources.
- A policy for the management of technology projects designed to define project categories, submission guidelines, execution and personnel requirements and the resolution of "troubled" projects.
- A highly successful training and certification program designed to insure that sufficient numbers of trained and qualified project managers are available to manage future technology projects in South Carolina.
- The South Carolina Organization for Project Excellence, an organization designed to build and share knowledge and best practices concerning the discipline of project management in state government.
- The South Carolina Management Training and Oversight Committee, an organization designed to offer advice on the best use of project management training to become a recognized leader in the field.
- The NASCIO State IT Project Management Forum, a national forum spearheaded by the PMO and its counterparts in New York and Tennessee. This forum is tasked with building and sharing a body of knowledge through the use of listservs, surveys and publications.

Thanks to the efforts of the South Carolina IT Project Management Office, countless benefits have been afforded to citizens and government agencies in terms of project scope, quality, time and cost.

With the leadership, direction and assistance of the PMO, the State of South Carolina can be assured that its future technology projects will be managed by some of the most qualified project managers in the country.

## South Carolina IT Project Management Office

While the field of project management is not a recent invention, it is an area that has received increasing attention from institutions, both public and private alike. According to the U.S. Department of Commerce's Bureau of Economic Analysis, public and private sectors spent an estimated \$2.3 trillion in 2001 on projects ranging from construction, research, development and information technology. This staggering amount is the equivalent of one quarter of our country's gross domestic product (GDP).

Governmental organizations have quickly recognized that traditional management processes are not able to adequately deal with the dynamics of today's economic, social and business environment. As such, there is a growing realization by agencies that the project management process is best suited to handle the daily changes faced by federal, state and local governments.

No area is faced with a more constantly changing landscape than the field of information technology (IT). Those engaged in the IT arena must have the ability to adapt to constantly changing technologies while engaged in high cost, high profile projects. While implementing project management adds significant value to organizations across the board, it seems a perfect fit for the IT arena. In particular, effective IT project management provides countless benefits in terms of scope, quality, time and cost.

With the overwhelming benefits afforded by the approach, government entities throughout the State of South Carolina were faced with the challenge of determining how best to implement project management on a statewide level. The South Carolina Budget and Control Board's Division of the State Chief Information Officer (CIO) responded to the challenge by creating the South Carolina IT Project Management Office (PMO).

Established in 2002, the PMO was given the task of creating and maintaining a documented project management methodology for IT projects undertaken throughout the state. Since its inception, the PMO has functioned to support government entities in implementing project management practices through:

- The development and promulgation of a project management methodology, which can be (1) adopted by any agency, or (2) used as a guide in the development of an agency-specific methodology.
- The establishment of government project management training and certification programs which are designed to increase the skills and knowledge of those persons whose job duties include project management.
- The creation of project management reporting and certification requirements for large, multi-agency, and enterprise projects.
- The dissemination of information resources, including forms, presentations, lessons learned and templates, to support project management "best practices."
- The development of a highly-trained and experienced IT project management staff.
- The support of, and participation in, numerous project management forums, committees, meetings and organizations throughout the state and national levels.

## **Project Management Methodology**

The PMO is responsible for overseeing the development of a project management methodology for use by all state agencies including policies, templates, metrics, dashboards, reporting requirements, glossary of terms, etc. This standard methodology facilitates cooperation, coordination and sharing of resources among agencies.

The methodology is designed so that it is not burdensome on agencies, but provides the appropriate project performance information needed to oversee the project. Agencies may request an exception in order to use a methodology of their choosing provided it applies generally-accepted project management principles throughout the project life cycle.

The PMO also reviews and approves other project management methodologies being used by vendors that provide the same or an enhanced level of management information and/or tools. In order to be approved, a methodology must capture the information needed to produce the metrics specified in the state's Project Status Reporting Dashboard.

The project management methodology developed by the PMO has five phases modeled after the Project Management Life Cycle contained in the Project Management Institute's Project Management Body of Knowledge (PMBOK). The five phases contained are as follows:

- Initiation
- Planning
- Execution
- Control
- Close-out

The project management methodology designed by the PMO is utilized on a consistent basis for all projects that have a technology component, regardless of the dollar value of the project. Because each project is different, this methodology is developed in such a manner that it can be "tailored" to the size, complexity and importance of the project.

Each State agency was required to adopt this project management methodology, or have an alternate methodology approved by the PMO, prior to July 1, 2005.

## **Policy for the Management of Technology Projects**

The PMO was responsible for the creation of the State's Policy for the Management of Technology Projects which defines four categories of projects including: minor, small, major and multi-agency/enterprise projects. As of July 1, 2005, all major and multi-agency/enterprise IT projects, as well as some small IT projects (those involving high risk, extending over several years, etc.) are required to be managed by a certified project manager. In addition, a "dashboard" status report must be submitted to the PMO periodically for these projects. The primary goal of this policy is to improve the success rates of IT projects throughout state government.

Other key points of this Policy include:

- Technology projects submitted to the IT Planning and Research Office must be supported by a business case analysis and must, unless an exemption has been requested by the agency and approved by the Architecture Oversight Committee), comply with the State's IT Enterprise Architecture
- Technology projects of long duration, more than twelve months, must be executed in phases with incremental objectives and measures of success, such that continued funding can be allocated based on achievements of prior phase objectives
- The Division of the State CIO may, on its own or upon request by appropriate agency personnel, require that specific actions be taken to address/resolve problems being experienced on a "troubled" project
- Each agency must adopt the State's project management methodology or have a methodology approved by the Division of the State CIO

### **Project Management Training and Certification Program**

In order to develop a more highly-trained and experienced statewide IT project management staff, the PMO offers a multi-tiered project management training program.

This program was developed with input from an Advisory Council representing state agencies, colleges and universities, and was designed to insure that a sufficient number of trained and qualified project managers are available to manage the State of South Carolina's technology projects in the future. The goal of the program is to provide each agency with cost-effective project management training in a manner sufficient to prepare selected staff to effectively manage all IT projects, without regard to size or complexity.

The program provides invaluable training opportunities for state employees in the use of the tools and techniques specified in the State's standard project management methodology. It includes appropriate project management training topics, delivery methods, curriculum design, certification process and levels, and includes the following courses:

- Project Management Overview
- Associate Project Management
- Project Management Methodology
- Senior Project Management

The PMO also recognized that in addition to having experienced, well-trained project management professionals assigned to manage projects, the culture of an agency must recognize, support and adopt project management as an effective management strategy.

To facilitate the development of this culture within State agencies, the PMO developed and administers an IT project management certification program, which establishes a career path for those interested in achieving various levels of certification necessary to independently manage technology projects. Certification is based upon such factors as:

- The number of certified project managers in an agency
- The consistent use of a project management methodology on all projects

- A record of projects completed successfully over the previous three years
- Financial and procurement audit findings

The training for project managers includes an experience requirement relative to the specific training being provided and includes a means (e.g. a test or exercise) by which to ensure that participants have successfully completed each component of the training.

The PMO has implemented a Project Management Academy for state government with the goal of participants working toward a state project management certification status. This state certification status is an intermediate step toward obtaining the Project Management Professional (PMP) certification offered by the Project Management Institute (PMI) or such other national project management certifications that may be recognized by the PMO.

State employees that have an approved project management certification (such as PMP) are only required to participate in training specific to the state to also obtain the state's certification as a project manager.

Often agency project managers are required to work with third party vendors to meet key project objectives. The PMO recognizes the importance of vendors having a clear understanding of the State's IT project management methodology and any project management requirements that may be specified in state contracts. To promote and support excellent project management, the PMO provides a four-hour orientation on project management requirements in South Carolina State Government to interested contractors and vendors seeking to do business with the State.

Through the PMO certification program, agencies have the ability to independently manage technology projects with a cumulative cost of up to \$5,000,000. While the ability exists, it does not relieve an agency of the requirement to submit information to the PMO as part of a Status Reporting Dashboard process. As such, certification is reviewed periodically by the PMO.

The training and certification program offered through the PMO has achieved tremendous success thus far. To date, the PMO has awarded Senior State Certified Project Manager status to over 60 individuals with another 75 individuals receiving the Associate State Certified Project Manager designation.

### **Benefits Provided by the South Carolina IT Project Management Office**

The creation of the PMO has provided numerous benefits not only to government agencies across the state but to the citizens of South Carolina as well. In particular, the PMO has offers improvements in:

- Time to project completion
- Customer satisfaction
- Alignment with strategic business goals
- Time and budget performance
- Contractor performance
- Schedule performance
- Cost performance
- Staff productivity

- Response time
- Estimations and overall quality

In addition to the progress made in the areas of State policy, methodology, training and certification, the PMO has also made significant contributions in a number of other areas including endeavors in project management networking, education, oversight on the state and national level.

### **South Carolina Organization for Project Excellence**

Shortly after the PMO conducted its first Senior Project Management class in November 2004, the need for a project management networking and educational organization was identified. With this need in mind, the PMO created the South Carolina Organization for Project Excellence (SCOPE).

SCOPE was designed to build and share a body of knowledge and best practices concerning the disciplines of project and portfolio management in state government. SCOPE activities are open to project managers from state and local government agencies, state vendors and educational institutions and have grown from a relatively small number of participants in the beginning to a point where standing room only crowds are the norm.

### **S.C. Project Management Training and Oversight Committee**

The Project Management Training and Oversight Committee (PMTOC) was designed to advise the PMO on how the State might best use project management training and certification program to become a recognized leader in delivering cost effective project management training.

### **NASCIO State IT Project Management Forum**

The PMO, along with its counterparts in New York and Tennessee, was a leading proponent in the creation of the National Association of State Chief Information Officer's State IT Project Management Forum.

This national forum, with the PMO's Beverly Cummings serving as Advisory Committee Chair, is designed to build and share a body of project management knowledge and best practices through a variety of channels including listserves, surveys and publications. Forum activities are open to all lead state IT project managers or their designees.

### **Conclusion**

Project management is now seen as the modern approach to managing change, resources and personnel in order to facilitate a project's completion. Countless benefits are felt in terms of scope, quality, time and cost throughout agencies across the state thanks to the efforts of the South Carolina IT Project Management Office.

With the leadership, direction and assistance of the PMO, the State of South Carolina can be assured that its future technology projects will be managed by some of the most qualified project managers in the country.