



VIRGINIA IT AGENCY

Project Management Standard Changes

PMD Training

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August 5-14

Agenda

- Change Request Thresholds
- High-Risk Projects
- New Agency O&G thresholds
- Weekly Support for Reporting on Red/Yellow Projects
- O&G Change for projects
- Limited Oversight
- Reporting Cadence for Projects
- Status Reporting Category 1-4

Change Request Thresholds

New

1. Nominal Change: IAOC and Agency Head may approve
 1. Previously up to 10% for Category 1, 2, 3 projects
 2. Previously up to 20% for Category 4 projects
2. Significant Change: IAOC, Agency Head, Secretariat Oversight Committee (Category 1 & 2), and CIO approve

Category	Previous % Change	New % Change
1	10%	15%
2	10%	20%
3	10%	25%
4	20%	35%

Reminder: nominal changes are cumulative

High-Risk Projects

A dark teal wavy banner with the word "New" in white text.

1. Project cost in excess of \$10 million, or
2. Project cost in excess of \$5 million and at least one of the following conditions apply:
 1. Project that is being conducted by two or more state agencies
 2. The anticipated duration of the project exceeds five (5) years
 3. The agency does not have past-performance within the last 5 years of successful completion of a project of similar cost or complexity
3. High-Risk projects are classified as Category 1
 1. i.e., no \$10M project will be Category 2, 3, or 4.

PMD must approve the selection and assignment of the Project Manager for high-risk projects

High-Risk Project Governance



New

- All high-risk projects are category 1
- High-Risk PM
- Designated Risk Manager (required)
- PMD included in Risk Reviews
- Risk reporting required monthly at the IAOC
- Support weekly reporting to SOA on each Category 1
- Quarterly briefing with the proponent secretary & SOA
- Agency Finance attendance at IAOC (Secretary invited as optional)
- Lower change control threshold (15% vs. 20% total cost/total time)
- Agency head cannot be a delegate on the IAOC
- PMD meets with project team every week

High Risk Project Manager

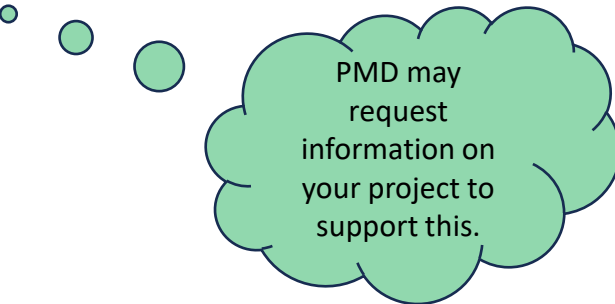
High-Risk PM qualification

- Active Project Management Institute (PMI) Project Management Professional (PMP) or PMI Agile Certified Practitioner (ACP) certification
- Documented risk management experience
- Completion of a Category 1 or 2 Commonwealth project of \$5M or more, or completion of non-COV project with a value greater than \$10M as PM of record.
- Review of PM qualification consistent with the PMQR

Weekly Reporting for Red/Yellow Projects

Status Reporting – Currently in Place

1. CIO desires more detailed and more periodic reporting on Yellow and Red status projects
2. For all Commonwealth level projects with Yellow status or Red status, or other projects identified by the Commonwealth CIO:
3. PMD is required to submit weekly updates. These updates will include:
 1. Communications of any factual indicators indicating that the project is not performing as anticipated for success (scope, schedule, budget)
 2. Actions required to address deficiencies.
 3. Updates on the results of these actions and reassessment of status.
 4. Updates on risks, issues and concerns, and mitigations thereof.



PMD may request information on your project to support this.

\$1M (Group 2 Status)



New

- All agencies continue with \$250K
- Agencies will be evaluated for Group 2 upon request to their PMD consultant
- All agencies will be reviewed at Strategic Planning
- Agencies not receiving the \$1M, will continue with O&G at \$250K
- *High level quarterly project status reporting (Limited Oversight)*
 - *Required for projects between \$250K and \$1M in CTP*
- If an agency loses the \$1M, they can ask for a reevaluation
- *The CIO has discretionary authority to designate agencies to Group 1 or Group 2.*

Criteria to Maintain Group 2 Status (\$1M)

1. IT Strategic Plans submitted on time
2. Successful completion of a Commonwealth level project within the previous 5 years
3. Favorable Assessment of project performance (current and past projects)
4. Project change request activity assessment (current and past projects)
5. IV&V's completed on time on previous and current projects

Group 2 Status Factors

Criteria

Favorable Assessment of Project Performance:

- Red, yellow, green status reports: Based on status reporting: equation that takes the number of status reports/ number of project months. IF R,Y/Project Months<25%

Project Change Request Activity:

- The agency has fewer than 25% of projects with 2 significant change requests

IV&V:

- Category 1 & 2: 1st IV&V within first 6 months after Detailed Planning phase; then annual IV&V if project is >12 months in duration. Project must have 12 months duration in Execution and Control phase or as requested by SOC, IAOC or CIO.

Limited Oversight (Group 2 only)



New

- Only needs high level quarterly project status reporting
- Required only for Group 2 projects between \$250K and \$1M in CTP
 - Project Name
 - Brief Description
 - Budget
 - Start and End Dates

Limited Oversight



- New Work Type – Limited Oversight
- All investment types are visible and have definitions now
- Only requires basic information

Investment Type Options Explained

- **AI Oversight** -- AI Oversight and Review.
- **Commonwealth Project** -- Projects requiring governance:
 - * **Group 1 Agency projects** where Budget (Initial Cost Estimate) is \$250,000 or greater
 - or
 - * **Group 2 Agency projects** where Budget (Initial Cost Estimate) is \$1 Million or greater.
- **Commonwealth Procurement** -- Procurement Governance Requests (PGR)
- **Limited Oversight** -- Reserved for **Group 2 Agency** projects where Budget (Initial Cost Estimate) is between \$250,000 and \$1 Million.
- **SCM Sourcing Project** -- Reserved for SCM use.
- **SCM Other Project** -- Reserved for SCM use.
- **VITA Internal** -- Reserved for VITA Internal use.
- **VITA Other** -- Reserved for VITA Internal use.
- **VITA CAM CIO Exception** -- Reserved for CAM use.
- **VITA CAM SPLM Exception** -- Reserved for CAM use.

Basic Information

* Agency	136 Virginia IT Agency (VITA)	🔍 📖 📄
* Work Name	PM Standard Training	✕
* Investment Type	Limited Oversight	▼
Planned Initiation Start Date	8/5/2024	✕
Planned Completion Date	8/27/2024	✕

General Information

Description	<div>B I T ☰ ☲ ☳ ☴ ☵ ☶ ☷</div> <div>Training Material</div>	
* Proponent Secretary	180 Secretary of Administration ▼	
* Proponent Agency	136 Virginia IT Agency (VITA) 🔍 📖 📄	
* Initial Cost Estimate	\$500,000 ✕	

Limited Oversight cont.

New

- Add Agency Group (2)
- Lifecycle sends this to the PMD Consultant for review
- Accidentally select wrong investment type, PMD can re-direct to correct lifecycle

General Information

General

Work Name

PM Standard Training

* Description

B I T | | | | | | | | | |

Training Material

* Planned Initiation Start Date

8/5/2024

×

* Planned Completion Date

8/27/2024

×

Budget:

×

*

500,000.00

×

Agency Info

Proponent Secretary

180 Secretary of Administration

Proponent Agency

136 Virginia IT Agency (VITA)

* Agency Group

2

▼

If **Agency Maturity Group** is "1", please correct the **Investment Type** (change to **Commonwealth Project**), save this page as **Draft**, and request the CTP Administrators (ctpe1admin@vita.virginia.gov) restart the project.

* Investment Type

Limited Oversight

▼

Contacts

* AITR

Alexa Rooney

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* PMD Consultant

Barbara Bronson

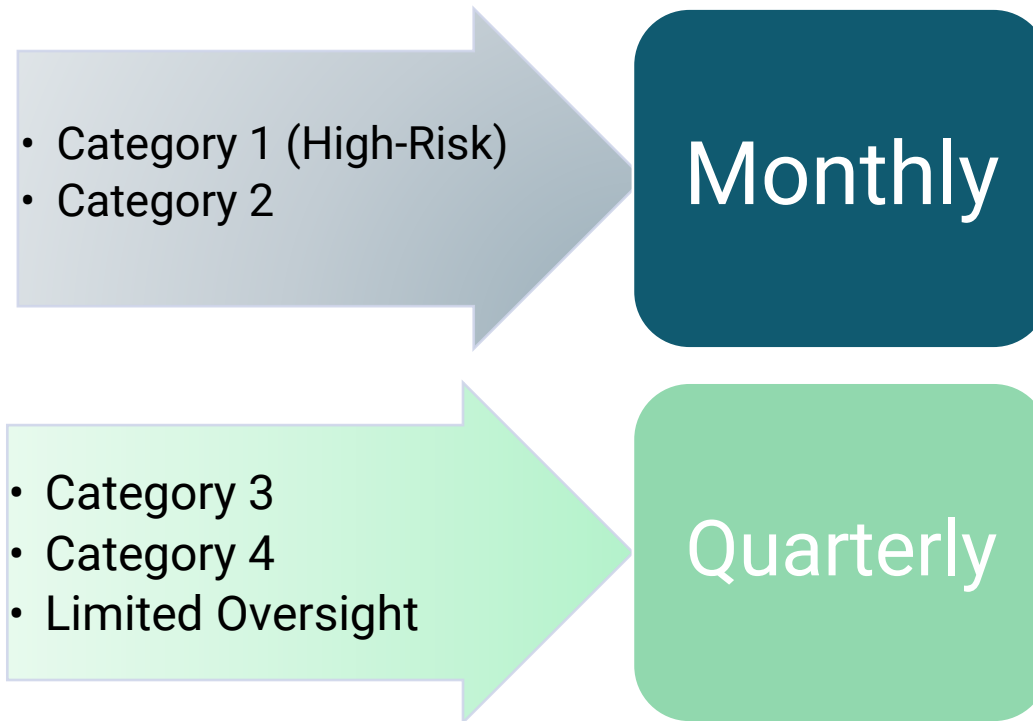
🔍 📌 📄

Contact Info Project Manager

Chris Chappell

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Status Reporting Cadence for Projects



Some Changes

Category 4 go from
semi-annual to
quarterly

Limited Oversight Status Reporting



New

- Scope, Schedule and Budget
- Changes to Start and End Date should be noted in comments
- Does not Impact the Group 2 Status of the Agency
- AITR or AITR Designee enters and maintains
- Entered Quarterly: January, April, June, October,

Limited Oversight Status Reporting

New

- COV Status Report screen
- Will only populate the Limited Oversight fields

Project Status

Project Status Summary

Provide information for the status report.

Reporting Period

Key Project Information

Work Name	PM Standard Training Screenshots
Proponent Secretary	180 Secretary of Administration
Proponent Agency	136 Virginia IT Agency (VITA)
Investment Type	COVA Limited Oversight
Investment Approval Status	Un-Assigned

Limited Oversight Status Information

SR Budget	
SR Schedule	
SR Scope	
Project Manager Status	
Report Comments	
Contact Info Project Manager	Chris Chappell

Limited Oversight Status Information

SR Budget	
SR Schedule	
SR Scope	
Project Manager Status	Warning
Report Comments	Problem
	On Track
Contact Info Project Manager	Suspended

Status Reports Category 1-4

Change

What's New

- New Actuals financials version screen to enable financial reporting when completing the status report

Why Change

- Feedback from project managers has been that utilizing the actuals/forecast (forecast) screen to track both actuals and forecast can be confusing

Benefits

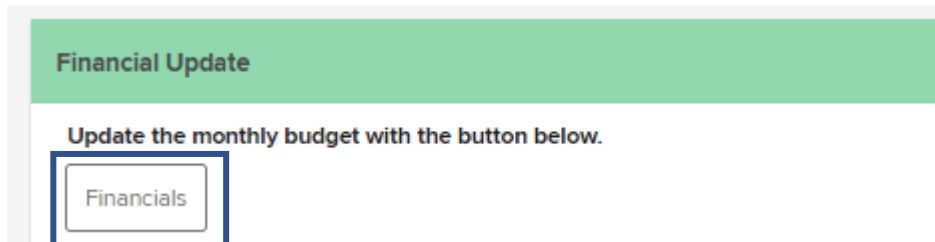
- Easier clearer reporting of project costs for project managers

Status Reports Category 1-4

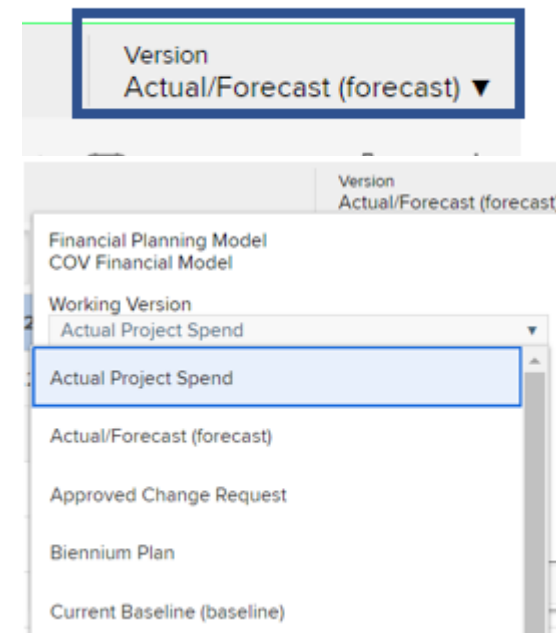
Change

Process

- From the COV Status Reporting Screen, mid way down the screen on the left
- Select the financials button (Save first)



- Select the Actual Project Spend screen from the Version drop down



Status Reports Category 1-4

How do I

- Tip: expand the view on the screen to Months by selecting the Timecycle icon
- Below shows the entry for the month of July 2024

Change

Years ▼

Type to filter		View Detail	⊕ Add a Line		All Available Account Lines		\$
	Description	Measures	2024	Jul 2024	Aug 2024	Sep 2024	Q1 2025
:	> Funding Need - General Funds	USD					
:	> Funding Need - Non-General Funds	USD					
:	▼ Type: Budget Plan - Costs	USD		132,500.0			132,500.0
:	> Internal Staff Labor	USD		7,500.00			7,500.00
:	> Services	USD		125,000.0			125,000.0
:	> Software Tools	USD					
:	> Hardware	USD					
:	> Maintenance	USD					
:	> Facilities	USD					
:	> Telecommunications	USD					
:	> Training	USD					
:	> IV & V	USD					
:	> Contingency (Risk)	USD					

Page autosaves
the information
entered

Status Reports Category 1-4

Reminder

Items to update at status reporting

- Top 5 risks and issues are reviewed and updated
- PM Comments
- Financials updated
- Plan updated

Final Thoughts

1. Portfolio size:

- 84 active projects (July 2024 snapshot) - Category 1, 2, 3, 4
- Project range in value: Currently \$250,000 - \$132,475,530
- Total Value: \$658.7 M (snapshot)

2. PMD introductions

- Barbara Bronson
- Chris Chappell
- Melissa Mutter
- Pat Reynolds
- Patty Samuels

Resources

- Job aid [Category 1-4 Status Report Entry](#)
- Job aid [Limited Oversight Status Entry](#)
- Quick reference sheet [PM Standard Change Quick Reference Guide](#)

Questions

