Project Management Standard
June 2022

Purpose:
The project management practices outlined herein apply to all information technology projects of the university whether performed by the central Information Technology organization or elsewhere in the JMU community.

Definitions:
Maintenance, Enhancement or Refresh (MER) Activity: Development, migration, or upgrade activity undertaken as part of the normal, on-going operation of an information technology system and that is not of such significance to be considered a system replacement or major architectural change.

Project Initiator: The individual proposing the selection or development of an information technology project.

Technology Solution Request (TSR): The form in the IT Service Portal that faculty and staff use to submit requests for technology solutions. There are two options when submitting a TSR – General Technology Solution Request and Technology Procurement Request. A General Technology Solution Request is used to request services of IT that are not related to procurement. A Technology Procurement Request should be submitted when procuring or renewing software as well as requesting additional functionality to software already procured.

Standard:
An information technology project is a temporary effort undertaken by or on behalf of the university that:

1. establishes a new technology-based system or service;
2. facilitates a significant business process transformation using technology; or
3. includes a major change in technology architecture or a system migration beyond that considered as general maintenance, enhancement, or refresh (MER) activity.

For Example:
- A major application upgrade (e.g. 3.x to 4.x) would typically be a project whereas general patch update or interim version upgrade (e.g. 3.2 to 3.25, 3.2.2 or 3.3) would not (MER activity).
- Designing/establishing a new lab facility might be a project while upgrading equipment/software in one would generally not.
- Implementation of a new cloud-based technology would be a project whereas configuring minor new functionality in the cloud-based technology would generally not be a project (MER activity).

Activities in support of academic programs are subject to project management requirements. However, such requirements generally do not apply to the use of technology in academic instruction or research,
unless the technology is used to collect, process, or store sensitive information. In such cases, information protection requirements and other aspects of project management do apply. Contact Information Technology at 8-7063 for specific guidance.

As outlined in JMU Policy 1202 (Information Systems Implementation & Project Management), if an individual/department is considering an information technology project, they must work with Information Technology to ensure appropriate analysis, classification, approval, and documentation steps are undertaken. In addition to promoting good technology management decisions, these steps also assist the university in meeting requirements set forth in Commonwealth of Virginia policies and standards.

Procedure:

1. Define the idea or need to be addressed by the project. Be able to communicate the project purpose and scope clearly to others.

2. Submit the Technology Solution Request (TSR) online here. Any inquiries should be directed to IT-Strategic Initiatives.

3. After receiving the TSR, Information Technology will respond as soon as possible regarding further analysis of the project. IT will work with the project initiator to collect additional information and complete any further analysis that may be necessary.

4. Based on its impact, cost, technical requirements, and complexity, Information Technology will recommend classification of the project. Based on the project classification, IT will advise the project initiator of the approvals and other project management and documentation steps necessary for the project to proceed.

In general, the level of oversight during the selection and management of technology projects varies based on the cost and complexity of the project. For this purpose, projects are classified as either major or non-major projects of various complexity.

The complexity of a project can be classified as high, medium, or low based on the overall work effort required to complete the project and the overall impact to the organization. The following table provides guidelines for determining the level of complexity for a given project:

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<th>Determining Complexity</th>
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<tr>
<td>High</td>
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<tr>
<td>Work effort required</td>
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<td>Organizational impact</td>
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<tr>
<td>Medium</td>
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<td>Work effort required</td>
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<td>Organizational impact</td>
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<tr>
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<tr>
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<td>Organizational impact</td>
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A major information technology project is one:

a. for which the costs, from project initiation to project closeout (generally operational production go-live), are greater than $1 million (including all hardware and software costs) or complexity level is high. Salaries for technical and functional personnel are to be considered part of project costs only if their involvement displaces their regular duties to an extent that it is considered a temporary reassignment. In such circumstances, the appropriate supervisor(s) will establish a Memorandum of Agreement describing the scope and duration of the reassignment and the individual’s involvement will be tracked.
as a project expense.

b. that is of such significance to the university that failure to achieve its expected outcomes could prevent JMU from accomplishing its mission or meeting its legal obligations until a workable alternative could be established; OR

c. set forth by the Virginia Information Technologies Agency (VITA) as having statewide application.

A non-major information technology project is one for which the costs, from project initiation to project closeout (generally operational production go-live) are those technology projects that have an estimated total project cost of less than or equal to $1 million, complexity level is low or medium, and are neither mission critical to the university or designated by VITA as having statewide application.

Among these non-major projects are end-user technology projects that support a specific department or unit need and impact only the department or unit developing or purchasing the system. End user computing systems typically reside on microcomputers within the departmental work area and may include applications developed in-house or purchased turnkey from a commercial vendor.

Regardless of project cost, there are some identifying characteristics that signal elevated risks or impacts for technology projects. Of particular concern are projects which include systems that:

a. interface to the university’s central systems (e.g. Human Resources, Finance, Student Administration, University Advancement, Card Services);

b. use the university’s authentication services (e.g. LDAP, Shibboleth, and/or Duo);

c. collect, process, or store sensitive data (e.g. personal data such as SSN, birth date, or grades, financial transactions, data related to grant-funded research, etc.); OR

d. provide critical technology capability across many departments.

If a project contains one or more of the risk or impact factors above, or if there is reasonable expectation that IT will provide space, system administration services, development assistance, or other support/resources for the project, IT is required to review and offer written risk assessment and service-level planning feedback. Depending on its cost and complexity, the project will be assigned a classification that involves certain approvals and documentation requirements. The following oversight approvals generally apply.
However, specific parameters of the project may make additional oversight approvals necessary.

JMU’s President has final project management oversight authority for the university and at his discretion, may demand review or discontinuation of any project.

5. As the initial analysis is completed and the project selection is approved, Information Technology, in conjunction with the project initiator and appropriate management approvers, will assign a final project classification and outline more specifically the project management and documentation requirements to be fulfilled as the project proceeds. Project Documentation Requirements for major and non-major projects of various complexity are available here.