

## **Rule 60DD-7.002 Project Management Methodology.**

(1) Key Principle. The Project Management Methodology set forth in this rule chapter is aligned with the Project Management Institute's (PMI©) Guide to the Project Management Body of Knowledge (PMBOK©), the recognized American National Standards Institute standard, incorporated by reference at subsection 60DD-7.014(1), F.A.C.

(2) Project Management Methodology Overview. While no two projects are alike, all projects should progress through the same five project management phases:

**(a) Project Origination** – In this phase an individual proposes a project to create a product or develop a service that addresses a need for the Organization. The Organization submits the Project Proposal to an evaluation and selection process. If selected, a budget or further management commitment for the project is required before a Project Manager is assigned and the project is authorized to progress to Project Initiation. Processes include:

1. Develop a Project Proposal – Tasks include **developing a Business Case** and a Proposed Solution.

2. Evaluate a Project Proposal – Tasks include presenting, evaluating and optionally rating the Project Proposal using predetermined evaluation criteria.

3. Accepting or rejecting the Project Proposal.

**(b) Project Initiation** – A Project Manager is assigned and works with the Project Sponsor to identify the necessary resources and team members needed to further develop the key project parameters: Cost, Scope, Schedule and Quality. The Project Team documents its charge in the form of a Project Charter, which is based on the Project Proposal, which **includes the initial Business Case**. Approval of the Project Charter by the Project Sponsor authorizes the designated team to begin the initial planning effort. The initial Project Plan differs in the level of detail and the validity of its estimates from Project Origination, and must be at a level sufficient to acquire any additional resources needed to progress. The Project Plan also includes plans for involving and communicating with all parties that are affected by the project, as well as identification of an initial set of foreseeable risks that can threaten the project. At the conclusion of Project Initiation, based on the initial planning documents, **the Business Case is revised** and re-evaluated and a decision is made to either halt the project or proceed to Project Planning. Processes include:

1. Preparing for the Project – Tasks include identifying a Project Sponsor, identifying the initial Project Team, reviewing historical information, developing a Project Charter, conducting a Project Kick-Off Meeting and Establishing a Project Repository.

2. Defining the Cost, Scope, Schedule and Quality – Tasks include defining the Project Scope, developing a high-level Schedule, identifying Quality Standards and establishing a Project Budget.

3. Performing Risk Identification – Tasks include identifying and documenting Risks.

4. Developing Initial Project Plan – Tasks include identifying and documenting Stakeholders' involvement in project, developing a Communication Plan, and compiling/gathering all information to produce the initial Project Plan.

5. Confirming Approval to Proceed to Next Step – Tasks include reviewing and **refining the Business Case**, preparing Formal Acceptance package, and gaining Approval Signature from Project Sponsor.

**(c) Project Planning** – This phase builds on the work done in Project Initiation by refining and augmenting Cost, Scope, Schedule, Quality and Project Plan deliverables. A number of key elements are added to the Project Plan, including project-specific items such as change control, acceptance management and issue management, as well as items such as organizational change management and project transition. The initial list of project risks is augmented, and detailed mitigation plans are developed. Project Planning marks the completion of the Project Plan. At the conclusion of Project Planning, **the Business Case is revised and re-evaluated** based on the completed planning documents and a decision is again made to either halt the project or commit the resources necessary for Project Execution and Control. Processes include:

1. Conducting Project Planning Kick-Off – Tasks include orienting new Project Team Members, reviewing outputs of Project Initiation and current Project Status, and kicking off project planning.

2. Refining the Cost, Scope, Schedule and Quality parameters – Tasks include refining the Project Scope, Project Schedule, Quality Standards and Quality Assurance activities and the Project Budget.

3. Performing Risk Assessment – Tasks include identifying new Risks and updating existing Risks as needed, quantifying the Risks and developing a Risk Management Plan.

4. Refining the Project Plan – Tasks include defining Change Control, Acceptance Management, Issues Management and Escalation processes, refining the Communications Plan, defining the Organizational Change Management Plan, establishing Time and Cost Baseline, developing the Project Team, and developing the Project Implementation and Transition Plan.

5. Confirming Approval to Proceed to Next Phase – Tasks include reviewing and **refining the Business Case**, preparing the Formal Acceptance package, and gaining Approval Signature from the Project Sponsor.

**(d) Project Execution and Control** – The phase where most of the resources are applied/expended on the project. The primary task of the Project Manager during this phase is to manage and control the tasks on the defined project Schedule to develop the product or service the project is expected to deliver and manage the project's budget, scope, schedule and risks. The Project Manager uses the processes and plans prepared during Project Initiation and Project Planning to manage the project, while preparing the business organization for the

implementation of the product/service and for transitioning the product/service responsibility from the Project Team to the Organization. Processes include:

1. Conducting Project Execution and Control Kick-Off – Tasks include orienting new Project Team Members (as needed), reviewing outputs of Project Planning, and kicking-off Project Execution and Control.

2. Managing Cost, Scope, Schedule and Quality parameters – Tasks include managing the Project Scope, Project Schedule and Project Budget, and implementing Quality Control.

3. Monitoring and Controlling Risks – Tasks include monitoring and controlling Risks and impact Risks have on Costs, Scope, Schedule and Quality.

4. Managing Project Execution – Tasks include managing Change Control processes, acceptance of Deliverables, managing Issues, executing the Communication Plan, managing Organizational Change, managing the Project Team, and managing the Project Implementation and Transition Plan.

5. Gaining Project Acceptance – Tasks include conducting the Final Status Meeting and gaining Acceptance Signature from the Project Sponsor.

**(e) Project Closeout** – In this last phase the Project Team assesses the outcome of the project, as well as the performance of the Project Team and the Organization. This assessment is accomplished primarily through soliciting and evaluating feedback from Customers, Project Team members, Consumers and other Stakeholders. The primary purpose of this assessment is to document best practices and lessons learned for use on future projects. Key project metrics are also captured to enable the business Organization to compare and evaluate performance measurements across projects. Processes include:

1. Conducting the Post-Implementation Review – Tasks include soliciting Feedback, conducting Project Assessment, and preparing the Post-Implementation Report.

2. Performing Project Closeout – Tasks include updating skills inventory, providing performance feedback, and archiving Project Information (repository).

*Specific Authority 282.102(16) FS. Law Implemented 282.102(2) FS. History–New 12-26-04.*