

Project Management Framework Lifecycle

Phase / Governance Gates	Project Intake Form Requested	Intake Phase 0	Initiation Phase 1	Planning Phase 2	Delivery Phase 3		Closeout Phase 4
		Gate 1	Gate 2	Gate 3	Gate 3+	Gate 4	
Primary Responsibility	Requester	• PMO	• Project Manager	• Project Manager	• Project Manager		• Project Manager
PMO Project Lifecycle Documents	Project Intake Form in TDX (Requester) 	1. Project Prioritization & Portfolio Analysis Tool 2. Business Case* <i>*Business Case only required if funding is not yet allocated. Use the Project Estimation Tool to provide a cost estimate.</i>	1. Project Charter 2. Project Estimation Tool 3. <u>Optional</u> Template based on Project Needs: Requirements Gathering Document	1. Project Planning Document Includes Scope, Cost, Schedule, Resources, Stakeholder Engagement, Governance, Issue, Risk, Communications, etc. 2. Project Plan/WBS 3. Organizational Change Management Plan 4. <u>Optional</u> Template based on Project Needs: Test Plan, Requirements Report (including Current vs. Future State Process)	1. Project Status & Reporting – Ongoing 2. Project Health Status Model – Ongoing 3. <u>Optional</u> Templates based on Project Needs: 1. Acceptance of Deliverables 2. Test Scripts 3. Architecture Diagrams	1. <u>Optional</u> Templates based on Project Needs: 1. Change Request Document 2. Approval to Proceed 3. Approval to Operate	1. Project Closeout Report
Action Items	• Requester completes Intake form & submits to IT PMO	• Project Manager reviews Request w/ input from requester, sponsor, & stakeholders • Project Manager sends completed Intake (w/ necessary refinements) to Governance committee to add to Meeting Docket	• Project Manager coordinates additional engagement • Project Manager completes charter • Project Manager shares charter & notifies Governance committee to add to Meeting Docket	• Project Manager completes planning documents (Project Planning Document, Project Plan/WBS, and OCM Plan) • Project Manager shares planning documents & notifies Governance committee to add to Meeting Docket.	• Project Manager executes project • Note: Project Steering Committees established to include initial project kickoff and regular updates to leadership • Project Manager notifies Governance committee of scope/schedule changes requesting to add to Meeting Docket. Project Manager will emphasize major risks and suggesting mitigation strategies.		• Project Manager & Project Sponsor inform Governance committee of Project Completion to add to Meeting Docket • Project Manager completes Project Closeout Report