	Montana Operations Manual *Policy*	Category	**Information Technology, Project Management**
		Effective Date	**No Date Set**
		Last Revised	**Not Approved Yet**

Issuing Authority	**Department of Administration** **State Information Technology Services Division**

POL - Information Technology Project Management and Reporting Policy

1. Purpose

The purpose of this policy is to implement the Information Technology Project Management and Reporting Policy for defining actions to promote project management across state government; to encourage the use of project management best practices; to help ensure state government projects meet their intended objectives with respect to scope, time, and budget.

2. Scope

This policy applies to executive branch agencies, per Section 2-17-505, MCA, excluding the university system, per Section 2-17-516, MCA. This policy does not apply to the national guard or the criminal justice information network, per Sections 2-17-516 and 2-17-546, MCA.

3. Roles and Responsibilities

A. To reduce risk to the State of Montana and increase project success, agencies:
  i. Must follow the standards and guidelines for project management found in the Project Management Body of Knowledge (PMBOK), which is published by the Project Management Institute (PMI).
  ii. Have the responsibility to ensure projects meet the intended objectives with respect to scope, time, and budget.
  iii. Are expected to assign qualified project managers to information technology projects.
      - A qualified project manager is defined in section 4 of this policy.
  iv. Are expected to adequately plan, manage, and monitor the performance of the projects.
  v. Must adhere to Section 2-17-505, MCA when planning and executing information technology projects.

B. Per 2-17-512, MCA, the Department of Administration (DOA) State Information Technology Services Division (SITSD) shall report information technology projects to the Legislative Finance Committee (LFC) on a regular basis.

C. Section 5-12-205, MCA defines the powers and duties of the LFC.

1. Requirements

A. Information Technology Project Portfolio Reporting Requirements per the LFC Memo dated March 6, 2012.
  i. Requirements defined by the LFC will be included in the quarterly information technology project portfolio report prepared by the SITSD for the LFC review.
  ii. The Legislative Fiscal Division (LFD) determined that projects which meet the

following criteria will be included on the LFC information technology project portfolio report:

- Project estimate is at least $500,000 for development. Development costs include costs for internal staff, vendor contracts, equipment, and software.
- Project is included in the bill that provides resources for long-range information technology (House Bill 10).
- Project is potentially of enterprise interest or need.
- Request from the LFC to include the project on the report. To address concerns with impact to the citizenry, LFD staff will review information technology strategic plans for smaller projects that pose potential risks to the public. Staff would bring forward those projects with potential risks to the LFC for discussion and potential placement on the information technology project portfolio listing.

iii. A supplemental report to LFC is required for the following scenarios:
- Project is re-baselined.
- Project health indicators change from green to yellow or red.
- Project health indicators continue at a color of yellow or red.
- Any time an agency would like to provide supplemental information regarding a project.

iv. A post-implementation report to LFC is required six months after a project close date.

v. Projects meeting the LFC reporting criteria will assign a qualified project manager to manage the project and report required data to the LFC.

4. Definitions

Refer to the PMBOK glossary for industry standard definitions.

A "qualified project manager" is a person who holds one or more PMI credentials and/or has been hired by an agency for the purposes of project management.

Information technology is defined in Section 2-17-506, MCA.

5. Enforcement

Policy changes or exceptions are governed by the Procedure for Establishing and Implementing Statewide Information Technology Policies and Standards. Requests for a review or change to this instrument are made by submitting an [Action Request form](). Requests for exceptions are made by submitting an [Exception Request form](). Changes to policies and standards must be prioritized and acted upon based upon impact and need.

6. References

A. 2-17-505, MCA
B. 2-17-506, MCA
C. 2-17-511, MCA
D. 2-17-512, MCA
E. 2-17-516, MCA
F. 2-17-546, MCA
G. 5-12-205, MCA
H. Montana Information Technology Act (MITA) Sections 2-17-504 et seq., MCA