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**Policy:** Every Information Technology project must be clearly defined in advance.

**Purpose:** To define the scope and purpose of an Information Technology project and determine its projected impact on - and potential risks to - the Company.

**Scope:** This applies to all software products and updates developed by the Company.

**Responsibilities:**

Information Technology Managers are responsible for conducting feasibility studies on proposed Information Technology projects, reviewing proposed projects with Top Management, and responding to User Management proposals.

The Information Technology Project Manager is responsible for creating, reviewing, and modifying project descriptions and creating project plans.

Top Management is responsible for reviewing project proposals with Information Technology Managers.

User Management is responsible for communicating its needs and requirements clearly when proposing an Information Technology project.

**Definitions:** Project definition – Stage in project planning that follows a project proposal; preliminary investigation of project’s feasibility, suitability, etc.

Project plan – Stage in project planning that follows project definition; describing the details of a project definition based on a proposal that has been accepted.

Project proposal – User Management’s formal, written proposal of a project for Information Technology. Typically followed by a request to Information Technology for a proposal, commonly known as an RFP.

Request For Proposal (RFP) – A formal user request to Information Technology for project estimates (time, other resources needed to deliver the project) and a description of project results.

Return on investment (ROI) - The annual financial benefit after an investment minus the cost of the investment; or, the total value gained after a solution has been deployed.

**Procedure:**

### 1.0 IT PROJECT NEEDS IDENTIFICATION

1.1 User Management shall gather information that identifies a need for a new software product or an enhancement to an existing product.

1.2 Such information should include:

* Customer feedback, surveys, and research about existing products;
* Competitive analysis;
* Market segmented needs analysis; and
* Changes in regulatory conditions or industry trends.

## 2.0 IT PROJECT DEFINITION

2.1 User Management shall state the problem or opportunity and how to address it in business terms in a document and submit this document to Information Technology Managers.

2.2 Information Technology Managers shall conduct a feasibility study of the situation, looking at issues such as:

* Will infrastructure created by this project be reusable?
* Can the project be developed using technology already on hand and in-house expertise?
* Can the project be developed with off-the-shelf software or will it require new applications?
* Will the project require additional hardware or user training?
* What are the estimated costs and the projected ROI?

2.3 Information Technology Managers shall review the proposed project with Top Management, evaluating it for fit with the Company’s needs and objectives, stated in ITAD101-1 INFORMATION TECHNOLOGY PLAN.

* Information Technology Managers shall respond to User Management, explaining why the proposed project was accepted or rejected.
* If the project is accepted, Information Technology Managers shall present time and cost estimates and select a project manager.

2.4 The Information Technology Project Manager shall create a project definition identifying the problem, describing the resources required to solve the problem, and including a cost-benefit analysis. The project definition should include, at a minimum:

* The name and unique ID of the project;
* Names of the project originators;
* The name of the Information Technology Project Manager;
* A detailed description of the project;
* The projected impact of the project on other areas of the company, such as shipping, marketing, sales, and software support;
* An estimated start and finish date and the estimated time required to complete the project, in worker-months;
* The estimated cost of the project, including:

1. People – a project may requires some or all of the following people, in addition to the Information Technology Project Manager: subject matter expert; systems analyst; software designer; programmer; technical writer; and/or quality assurance analyst;
2. Hardware – new equipment or upgrades to existing equipment required for the project;
3. Software – new software or upgrades to existing software required for the project;
4. Office space and other logistical requirements; and
5. An estimated project budget.

* Anticipated short- and long-term profits; and
* A cost analysis, to determine if the Company can afford the resources needed to develop the project.

## 3.0 IT PROJECT DEFINITION REVIEW

3.1 The Information Technology Project Manager shall review the project definition with Information Technology Managers. They shall discuss management’s concerns and determine whether to go forward with the project. Concerns management might have may include:

* Are outside financing sources or partnerships feasible?
* How great is the market demand for the product?
* If the project cannot be completed on schedule, will it still be marketable?
  1. The Information Technology Project Manager modifies the project definition to address management’s concerns and then begins work on a detailed Information Technology Project Plan.

## 4.0 IT PROJECT PLAN

The Information Technology Project Manager shall create a project plan that describes in detail how the project will be accomplished; ITSW101-1 IT PROJECT PLAN may be used as a guide. The plan begins with the project definition and expands the technical details to include six required sections:

* Project Overview. Describes the purpose, scope, and objectives of the project as well as assumptions, constraints, risks, project deliverables, schedules, and budget. Any definitions, acronyms, and references should also be described.
* Project Organization. Defines the external interfaces, internal structures, and each person’s roles and responsibilities on the project.
* Managerial Process Plans. Defines all of the management deliverables for the project from the start-up plan to the project closeout plan. Details include: project estimates, staffing, resources, training, scheduling, controls, reporting, tracking, risks, and project metrics. A lot of the managerial process revolves around the work breakdown structure which defines the principal activities in greater project management detail.
* Technical Process Plans. Describes the software processes, models, methods, tools, and techniques including definitions of infrastructure, product acceptance criteria and final deployment plans used for developing the work products or services for the project.
* Supporting Process Plans. Describes all other plans not included above that support the project including: configuration management, verification and validation, documentation, quality assurance, reviews and audits, problem resolution, subcontractor management, and process improvement.
* Additional Plans. Specify or reference any additional plans required to satisfy product requirements and contractual terms, which may include: plans for meeting safety, privacy, or security requirements, special facilities or equipment specification, product installation or integration plans, data conversion and system transition plans, and product training, support and maintenance plans.

**Forms:**

* ITSW101-1 IT PROJECT PLAN

**References:**

* 1. **ISO/IEC 12207:2008, “SYSTEMS AND SOFTWARE ENGINEERING – SOFTWARE LIFE CYCLE PROCESSES”**
  2. **IEEE 12207-2008, “SYSTEMS AND SOFTWARE ENGINEERING – SOFTWARE LIFE CYCLE PROCESSES”**

This ISO standard describes the major component processes of a complete software life cycle and the high-level relations that govern their interaction. It establishes a software life cycle architecture based on two principles, modularity of processes and responsibility for processes. There are three process classes in the ISO software life cycle – primary, supporting, and organizational. Each life cycle process is made up of activities, and each activity is further subdivided into tasks. The standard is based on ISO quality management principles.

The IEEE version of 12207 is closely aligned with, but not the same as, its ISO counterpart. For more information, visit <http://www.iso.org/iso/catalogue_detail.htm?csnumber=43447> or <http://standards.ieee.org/findstds/standard/12207-2008.html>.

* 1. **IEEE #16326-2009, “SYSTEMS AND SOFTWARE ENGINEERING – LIFE CYCLE PROCESSES – PROJECT MANAGEMENT”**

ITSW101-1 IT PROJECT PLAN is adapted from the IEEE standard for software project management, as well as from the data requirements of ISO/IEC 12207. For details, see <http://standards.ieee.org/findstds/standard/16326-2009.html>.

**Additional Resources:**

* IEEE Software and Systems Engineering Standards List – <http://standards.ieee.org/findstds/standard/software_and_systems_engineering.html>

**Revision History:**

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| **Revision** | **Date** | **Description of Changes** | **Requested By** |
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