



# IT Project Manager Assignment Guideline

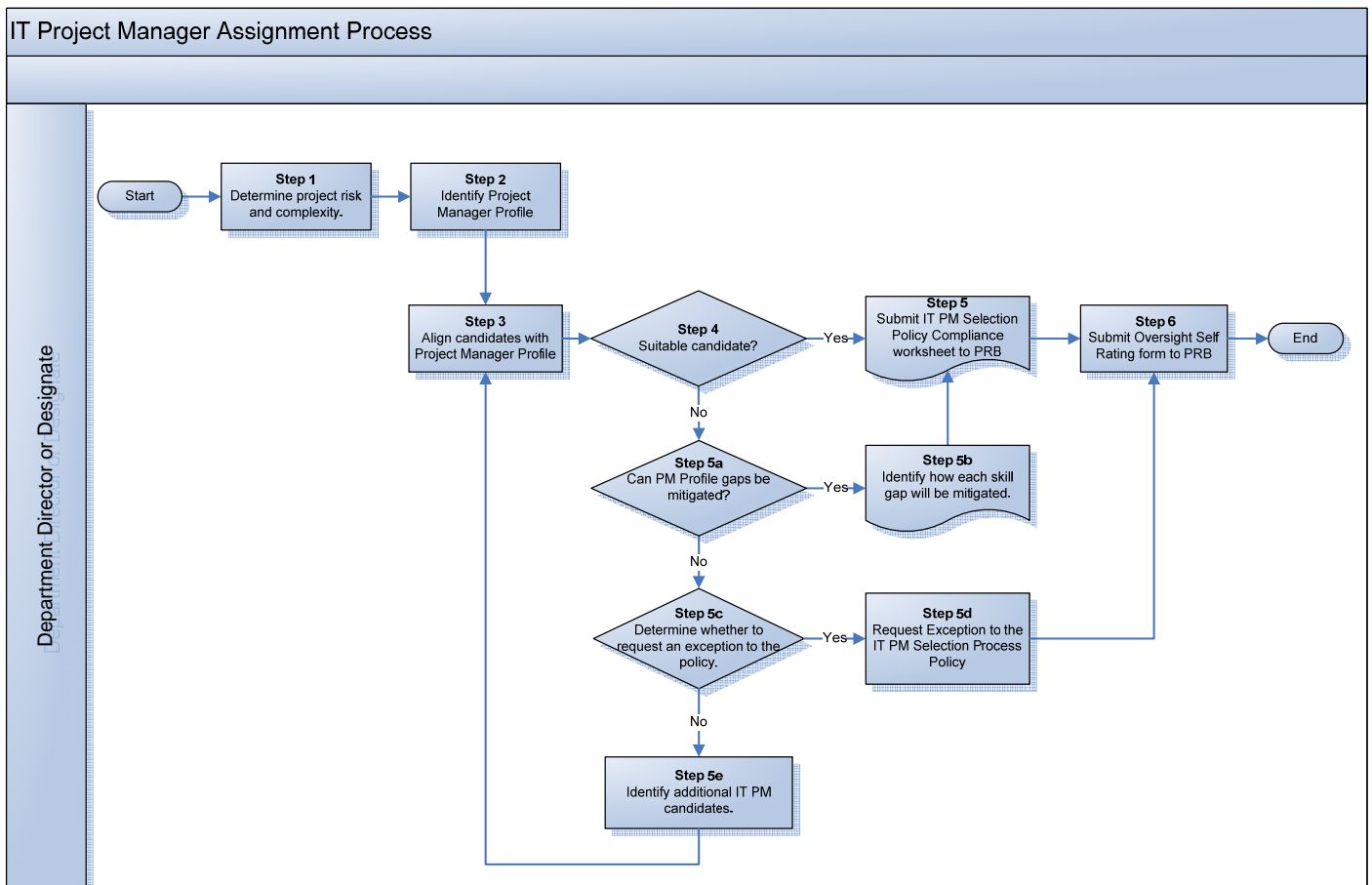
## Overview

This guideline directly supports the IT Project Manager Selection Process Policy and is intended to aid department directors and their designees in assigning suitable candidates to the IT project manager role. It provides a process to assess the risk and complexity of an IT project and to identify the skills and experience necessary for the IT project manager. The guideline is intended to provide a consistent structure for validating that an IT project manager candidate is suitable for the assignment and ensure appropriate due diligence during the selection process, since assignment of the IT project manager is one of the most important decisions affecting any project.

This guideline is intended to enhance the hiring process. As a variant to the process described below, project sponsors may wish to assess the risk and complexity of the IT project and identify the necessary PM skills and experience prior to posting an IT PM position. Information derived from the project risk and complexity assessment could be useful in creating the job description and for initial screening of applicants.

## The Process

The following diagram indicates the steps to follow when assigning an IT project manager:





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NOTE: Click on the link below to access an automated tool to facilitate the entry of project risk/complexity values in step 1 and automatic creation of the PM profile in step 2 of the process. This workbook includes instructions and a table for completing the IT Project Manager Selection Process Policy Compliance worksheet. <http://kcweb.metrokc.gov/oirm/policies.aspx>

## **Step 1: Determine Project Profile**

Project characteristics have been identified for project risk and complexity. Each of these characteristics must be assessed in order to understand the project's inherent risk areas.

1. Using the worksheet in Appendix A, assign a value (N/A, Low, Medium, High, Very High) to each project characteristic.
2. Enter the appropriate value for your project in risk/complexity rating column in the worksheet in Appendix C.

## **Step 2: Identify Project Manager Profile**

Each of the ratings in the risk/complexity assessment in step 1 correlates to a specific skill set description in the PM profile in Appendix B.

1. Using the worksheet in Appendix B, identify the PM profile value that describes the necessary skill sets for each project characteristic. For example, if the value identified for the Project Characteristic is "Low" in Appendix A, the PM profile value in Appendix B for that same project characteristic will be found in the "Low" cell.
2. Enter the PM profile skill set description for each project characteristic in the PM profile column of the IT Project Manager Selection Process Policy Compliance worksheet in Appendix C.

## **Step 3: Align candidates with the PM profile**

For each project characteristic identified in Appendix C:

1. Identify whether the candidate "meets", "exceeds", or "does not meet" the PM profile description in the candidate alignment column of the IT Project Manager Selection Process Policy Compliance worksheet in Appendix C.

## **Step 4: Determine Candidate Suitability**

A competitive and suitable candidate is one that "meets" or "exceeds" the PM profile description for each project characteristics.

1. For each project characteristic that the PM candidate "does not meet" the PM profile, go to Step 5a.
2. Otherwise, go to Step 5.



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### **Step 5: Submit PM Assignment Worksheet to PRB**

The PRB oversees compliance with the IT PM Selection Process Policy. In order to track compliance, PRB requires submission of the completed IT Project Manager Selection Process Policy Compliance worksheet in Appendix C.

1. Complete the worksheet with the project name, department, date, and department director's signature.
2. Submit completed worksheet to PRB staff (step 6).

### **Step 5a: Determine If PM Profile Gaps Can Be Mitigated**

1. For each project characteristic that the PM candidate "does not meet" the PM profile, determine if this gap in skill and/or experience can be mitigated.
2. If it can be mitigated, go to Step 5b.
3. Otherwise, go to Step 5c.

### **Step 5b: Identify How Each Skill Gap Will Be Mitigated**

1. For each project characteristic that the PM candidate "does not meet," identify the steps that will be taken to mitigate the gap in their skills and/or experience. Mitigation steps may include additional training, mentoring, supplemental resources, oversight, or other strategies as appropriate. See the Project Management Center of Excellence web page <http://kcweb.metrokc.gov/oirm/programs.aspx> for trainings specific to King County internal processes.
2. Go to Step 5.

### **Step 5c: Determine Whether to Request An Exception to the IT PM Selection Process Policy**

1. Determine if an exception to the policy needs to be requested.
2. If there is no way to adequately mitigate the gaps in the PM candidate's skills and experience and the department director wants to go forward with this candidate as the IT project manager, go to Step 5d.
3. Otherwise, go to Step 5e.

### **Step 5d: Request Exception to the IT PM Selection Process Policy**

1. Follow the steps in section 6 of the IT PM Selection Process Policy to request an exception.
2. Go to Step 6.

### **Step 5e: Identify Additional IT PM Candidates**

1. Work with HR-SDM to identify additional candidates.
2. Go to Step 3 to resume the alignment process to determine the most suitable candidate.



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### **Step 6: Submit Project Oversight Self-Rating Assessment to PRB**

The [project oversight self-rating assessment form](#) is expected to be completed for all projects, once the Project Manager has been assigned. See the [instructions](#) for the form to determine the impact of various levels of self-monitoring.

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## APPENDIX A: Project Profile

Project Profile						
Project Characteristic	Project Risk / Complexity Rating	N/A	Low	Medium	High	Very High
Size of Project Team		Project requires PM only	1 to 2 project team members	3 - 5 project team members	6- 10 project team members	More than 10 project team members
Type of Team Reporting Relationships		No team members needed besides PM	Dedicated project team members	Cross functional/matrixed project team	Cross-functional/matrixed project team with key team members in high demand	[No Very High rating for this project characteristic]
Team Technology Skills		Technology skills not needed on this project or not known at this time	Technology skills needed by project team are readily available in house	Technology skills needed by project team exist in the County but are not available to the project	New technology skills required for project team are not available in the County	[No Very High rating for this project characteristic]
Project Duration		1 to 4 weeks	1 to 6 Months	6 to 12 months	12 to 24 months	More than 24 months
Project Budget		No project budget; internal staff time only	Less than \$250K	\$250k to \$1MM	\$1MM to \$25MM	More than \$25MM
Project Schedule		[No N/A rating for this project characteristic]	Schedule is very flexible	Some schedule variations should be okay	Schedule is mandated and cannot be changed	[No Very High rating for this project characteristic]
Hardware Technology		Hardware is not being deployed	Required hardware is widely used in the County and is commonly available	Required hardware exists in the County but is not widely used	Required hardware is not used in the County	Required hardware is breakthrough technology and new to government organizations

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Project Profile						
Project Characteristic	Project Risk / Complexity Rating	N/A	Low	Medium	High	Very High
Software Technology		Software is not being implemented	Required software is widely used in the County	Required software exists in the County but is not widely used	Required software is not used in the County	Required software is breakthrough technology and new to government organizations
Level of Integration/Interfaces		No integration or interfaces necessary	Minimal integration and/or interfaces, and with only non-critical system	Some integration and/or interfaces with critical and non-critical systems	Significant integration and/or interfaces necessary with many critical systems	[No Very High rating for this project characteristic]
Level of Change to Business Operations		No changes to business processes	Automate or improve existing business process in an agency	Create new business processes in an agency	Create new, re-invent and/or dramatically alter business processes in an agency	Create new, re-invent and/or dramatically alter business processes across the County and/or external entities
Level of Impact on the Organization		No impact to organization	Affects individuals, small workgroup	Affects multiple divisions within a department	Affects an entire department and/or labor agreements	Affects multiple departments, entire county, labor agreements, and/or multiple-jurisdictions outside the County
Level of Vendor Involvement		No vendor involvement expected	Past experiences with expected vendor(s) has been good	Past experiences with expected vendor(s) has been good but this is a new are for the vendor(s)	Have no past experience with expected vendor(s)	[No Very High rating for this project characteristic]
Expected Procurements		No procurements expected	Use existing contracts for procurements	Use existing IT Master Roster; use an invitation to bid (ITB) or a letter RFP (for contracts under \$25,000)	Use advertised RFP (for contracts over \$25,000) or procurement waiver for new contract	Use advertised RFPs (for contracts over \$25,000) to establish more than one complex and/or

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Project Profile						
Project Characteristic	Project Risk / Complexity Rating	N/A	Low	Medium	High	Very High
				for new contracts		high dollar contract
<b>Problem Definition</b>		[No N/A rating for this project characteristic]	Problem is well defined	Problem is somewhat defined	Problem is not well defined	Multiple problems exist and are not well understood
<b>Project Scope Definition</b>		[No N/A rating for this project characteristic]	Scope is well understood	Scope is somewhat un-clear	Scope is not well understood	[No Very High rating for this project characteristic]
<b>Solution Definition</b>		[No N/A rating for this project characteristic]	Solution is clear and readily achievable	Solution is clear, but how to achieve solution is still unclear	Solution and how to achieve it are unclear	[No Very High rating for this project characteristic]
<b>Project Interdependencies</b>		No project interdependencies	Interdependencies are known and manageable	Interdependencies are known, some are manageable, some are beyond control of project	Most interdependencies are beyond control of project	[No Very High rating for this project characteristic]
<b>Specialized Business Knowledge</b>		Project manager needs no specialized business knowledge	Project manager needs an awareness of the business area	Project manager needs some knowledge of the business area	Project manager needs in-depth knowledge of the business area	[No Very High rating for this project characteristic]
<b>Specialized Technology Competencies</b>		Project manager needs no specialized technology competency or technology competencies not identified at this time	Project manager needs an awareness of specialized technology competency(s)	Project manager needs some knowledge and experience with specialized technology competency(s)	Project manager needs extensive knowledge and experience with specialized technology competency(s)	[No Very High rating for this project characteristic]
<b>Regulatory Requirements</b>		No regulatory requirements specific to this project	Potential for regulatory requirements apply to this project	Existing regulatory requirements need to be met by this project	New regulatory requirements will need to be met by this project	[No Very High rating for this project characteristic]

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### APPENDIX B: Project Manager (PM) Profile

Project Manager Profile					
Project Characteristic	N/A	Low	Medium	High	Very High
<b>Size of Project Team</b>	At least 1 year experience managing IT projects	At least 1 year experience in a leadership role managing a team of 1 - 2 people	At least 2 years experience in a leadership role leading a team of 3-5 people with good understanding of teambuilding and conflict management tools and techniques	At least 2 years experience leading a team of more than 5 people with outstanding team-building and conflict management skills	At least 2 years experience managing a team of more than 10 people with advanced leadership skills with expert team-building and conflict management skills
<b>Type of Team Reporting Relationships</b>	Project staff identification and negotiation skills not needed	Experience on at least 2 projects of similar size and scope, where project team members are assigned fulltime to project	Experience on at least two projects of similar size/scope where project team members are matrixed to other projects and/or have other responsibilities	Experience on at least two projects of similar size/scope, where project team members are matrixed with excellent skills in negotiating with other managers to fulfill resources needs	[No Very High rating for this project characteristic]
<b>Team Technology Skills</b>	No special technology recruiting skills needed	Some experience in identifying technology skill set needs and ensuring people are committed to project activities and timeline	Minimum one year experience identifying technology skill set needed for this project and ensuring the right people fulfill these needs	Minimum two years experience in identifying technology skill sets needed for projects, and recruiting the right people to fulfill these needs	[No Very High rating for this project characteristic]
<b>Project Duration</b>	Limited task management experience needed for very short projects	Experience managing at least two short-term projects of 1-6 months each, including developing simple project plans that provide a detailed description of the work and how it will be managed	Experience managing at least two projects with durations of 6 months to 1 year each, including developing project plans that provide a detailed description of the work and how it will be managed	Experience managing at least two projects with durations of 1 to 2 years each, including strong skills in developing project plans that provide a detailed description of the work and how it will be managed	Experience managing at least three projects with very large scope and durations longer than 2 years each, including expert skills in developing project plan that provides a detailed description of the work and how it will be managed

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Project Manager Profile					
Project Characteristic	N/A	Low	Medium	High	Very High
<b>Project Budget</b>	Understanding of basic budget planning and tracking skills	Experience in estimating, tracking, and managing expenses budgets less than \$250K - understanding of County financial processes and reporting is helpful	Experience in estimating, tracking, and managing expense budgets ranging from \$250K - \$1MM - understanding of County financial processes and reporting is helpful	Experience in estimating, tracking, and managing of expense budgets ranging from \$1MM - \$25MM - understanding of County financial processes and reporting is helpful	Experience in estimating, tracking, and management of expense budgets greater than \$25MM - understanding of County financial processes and reporting is helpful
<b>Project Schedule</b>	[No N/A rating for this project characteristic]	Good understanding of work breakdown structure concepts; defining project activities, tasks, their sequence, dependencies and time estimates; tracking issues; methods for managing IT risks	Demonstrated experience in creating work breakdown structures; defining project activities, tasks, their sequence, dependencies and time estimates; tracking issues; managing IT risks	Highly skilled and experienced in creating work breakdown structures; defining project activities, their sequence, dependencies and time estimates; tracking issues tracking; managing IT risks	[No Very High rating for this project characteristic]
<b>Hardware Technology</b>	No special hardware skills/experience needed	Basic understanding of the expected hardware technology(s)	Good understanding of expected hardware technology(s) with experience introducing new hardware technology; experience collaborating with other technical teams to design and support new hardware element(s); good vendor management and operational readiness planning skills	Experience introducing new hardware technology and at facilitating technical discussions between vendors, engineers, and technology experts; advanced skills in test planning and management, vendor management, operational readiness planning; knowledge and experience applying IT quality management principles	Extensive experience introducing new hardware technology and at facilitating technical discussions between vendors, engineers, and technology experts; advanced skills in test planning and management, vendor management, operational readiness planning; strong knowledge and experience applying IT quality management principles

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Project Manager Profile					
Project Characteristic	N/A	Low	Medium	High	Very High
<b>Software Technology</b>	No special software skills/experience needed	Basic understanding of the software technology(s)	Good understanding and prior experience with the software technology; experience facilitating technical discussions and definition of user requirements; good vendor management and operational readiness planning skills	Experience facilitating technical design and user requirement discussions; good communication skills to introduce technology into the environment; skilled in test planning and management, vendor management, operational readiness planning; knowledge and experience applying IT quality management principles	Extensive experience facilitating technical design and user requirement discussions; strong communication skills to introduce technology into the environment; advanced skills in test planning and management, vendor management, operational readiness planning; strong knowledge and experience applying IT quality management principles
<b>Level of Integration/Interfaces</b>	No integration skills needed	Able to identify integration requirements and collaborate with other groups to ensure changes are coordinated across all impacted organizations with good understanding of IT test planning and management	Experience identifying integration requirements and collaborating with other groups to ensure changes are coordinated across all impacted organizations with skills in test planning and management	Experience working across organizational boundaries to ensure changes are coordinated with all impacted organizations with strong skills in test planning and management	[No Very High rating for this project characteristic]
<b>Level of Change to Business Operations</b>	No business specific organizational knowledge needed	Basic understanding of the business area and the user base, and business process analysis, tools, and techniques	Good understanding of the business area and the user base; some experience with business process analysis, tools, and techniques; experience developing training plans	Strong understanding of <u>or</u> prior experience with business area and user base; experience with business process analysis, tools, and techniques; experience developing and managing training plans for at least one medium-to-large project	Advanced understanding of <u>and</u> prior experience with the business area and user base; strong experience with business process analysis, tools, and techniques; and developing and managing training plans for several large projects

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Project Manager Profile					
Project Characteristic	N/A	Low	Medium	High	Very High
<b>Level of Impact on the Organization</b>	Basic written and verbal communications required	Skillfully communicates, whether in writing or orally, utilizing effective communication methods; awareness of "people" change management tools and techniques	Writes clearly and concisely; verbally articulate; skilled in using a variety communication methods to disseminate project information; knowledge of "people" change management tools and techniques	Strong written and verbal communicator, skilled in making effective executive presentations with good understanding of a variety of communications methods; experience with "people" change management tools and techniques;	Very strong written and verbal communicator; very skilled in making effective presentations, especially to executive-level audiences; strong understanding of countywide interactions and interactions with other jurisdictions; knowledge of county labor agreements; extensive experience with "people" change management tools and techniques
<b>Level of Vendor Involvement</b>	No vendor management skills needed	Able to manage vendors to perform and deliver against contracts	Experience managing vendor performance to meet contractual scope of work and deliverables	Strong experience managing vendor performance to meet contractual scope of work and deliverables	[No Very High rating for this project characteristic]
<b>Expected Procurements</b>	No procurement skills needed	Understands County's procurement process to purchase vendor services/products using existing county contracts	Good experience and understanding of the County procurement process with some experience writing and negotiating contracts, including scope of work, deliverables, and pricing	Solid experience and understanding of the County's procurement process with strong experience writing RFPs including detailed requirements, vendor proposal evaluation criteria and scoring, and writing and negotiating vendor contracts including scope of work, deliverables, and pricing	Experience writing detailed contractual scopes of work, describing required deliverables, detailed requirements, vendor proposal evaluation criteria and scoring, and negotiating complex vendor contracts

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Project Manager Profile					
Project Characteristic	N/A	Low	Medium	High	Very High
<b>Problem Definition</b>	[No N/A rating for this project characteristic]	Understanding of standard problem definition tools and techniques, and some experience in developing problem statements	Experience on at least two other projects using standard problem definition tools and techniques to develop concise problem statements; good written communication and meeting facilitation skills	Demonstrated skill on at least three projects using standard problem definition tools and techniques to develop concise problem statements; strong written communication and meeting facilitation skills	Demonstrated skill on at least five projects using standard problem definition tools and techniques to develop concise problem statements; advanced written communication and meeting facilitation skills
<b>Project Scope Definition</b>	[No N/A rating for this project characteristic]	Basic understanding of scope definition and some experience in identification of project deliverables	Demonstrated experience in scope definition and identification of project deliverables	Extensive experience in scope definition, deliverable identification, and scope management	[No Very High rating for this project characteristic]
<b>Solution Definition</b>	[No N/A rating for this project characteristic]	Basic understanding of requirements gathering; able to facilitate development of a conceptual solution to address the business problem	Skilled in eliciting requirements and developing conceptual designs; able to facilitate and involve the right technical resources to develop solution alternatives	Highly skilled and experienced in eliciting requirements and developing a conceptual design; strong experience in facilitating and involving the right technical resources to develop solution alternatives	[No Very High rating for this project characteristic]
<b>Project Interdependencies</b>	No skills needed in this area	Able to recognize project interdependencies, and cooperate and collaborate with other groups to manage known interdependencies	Good skills to surface and recognize project interdependencies, assess risk, and communicate across project boundaries to meet expectations, and cooperatively manage interdependencies	Strong skills to surface and recognize project interdependencies, assess risk, communicate across project boundaries to meet expectations, and collaborate with other groups to manage interdependencies beyond the control of the project	[No Very High rating for this project characteristic]

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Project Manager Profile					
Project Characteristic	N/A	Low	Medium	High	Very High
<b>Specialized Business Knowledge</b>	No specialized business knowledge or experience needed	Basic understanding of the business area	Good understanding of and some experience with the business area	Advanced understanding of and many years of work experience in the business area	[No Very High rating for this project characteristic]
<b>Specialized Technology Competencies</b>	No skills needed in this area	Some experience working with or deploying the specialized technology(s)	Good experience in working with or deploying the specialized technology(s)	Advanced experience and knowledge with the specialized technology(s)	[No Very High rating for this project characteristic]
<b>Regulatory Requirements</b>	No skills needed in this area	Some experience working with regulatory requirements and a basic understanding of the possible constraints	Good experience working with regulatory requirements and a good understanding of possible constraints	Extensive experience working with regulatory requirements and detailed understanding of constraints and their impacts	[No Very High rating for this project characteristic]



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## APPENDIX C: IT Project Manager Selection Process Policy Compliance

Project Name: \_\_\_\_\_ Project Manager Name: \_\_\_\_\_ Date submitted: \_\_\_\_\_

Department: \_\_\_\_\_ Director Signature: \_\_\_\_\_

A. Project Characteristic	B. Risk/Complexity Rating	C. PM Profile	D. Candidate Alignment	E. Skill Gap Mitigation Steps
Size of Project Team				
Type of Team Reporting Relationships				
Team Technology Skills				
Project Duration				
Project Budget				
Project Schedule				
Hardware Technology				
Software Technology				
Level of Integration/Interfaces				
Level of Change to Business Operations				
Level of Impact on the Organization				
Level of Vendor Involvement				
Expected Procurements				
Problem Definition				
Project Scope Definition				

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A. Project Characteristic	B. Risk/Complexity Rating	C. PM Profile	D. Candidate Alignment	E. Skill Gap Mitigation Steps
Solution Definition				
Project Interdependencies				
Specialized Business Knowledge				
Specialized Technology Competencies				
Regulatory Requirements				