

	Montana Operations Manual <i>Policy</i>	Category	Information Technology, Project Management
		Effective Date	01/08/2015
		Last Revised	01/09/2018
Issuing Authority	Department of Administration State Information Technology Services Division		
POL-Information Technology Project Management and Reporting Policy			

I. 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; and to help ensure state government projects meet their intended objectives with respect to scope, time, and budget.

II. Scope

This policy applies to all state agencies 2-17-505 et seq., MCA. This policy will adhere to the exemptions as defined in 2-17-516, MCA and 2-17-546, MCA.

III. Roles and Responsibilities

A. To reduce risk to the State of Montana and increase project success, agencies:

1. 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).
2. Have the responsibility to ensure projects meet the intended objectives with respect to scope, time, and budget.
3. Are expected to assign qualified project managers to information technology projects.
 - a. A qualified project manager is defined in section (VI)(C) of this policy.
4. Are expected to adequately plan, manage, and monitor the performance of the projects.
5. Must adhere to 2-17-505, MCA when planning and executing information technology projects.

B. 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 (2-17-512, MCA).

1. LFC powers and duties are defined in 5-12-205, MCA.

IV. Requirements

- A. Information Technology Project Portfolio Reporting Requirements per the [LFC Memo dated March 6, 2012](#).
 - 1. Requirements defined by the LFC will be included in the quarterly information technology project portfolio report prepared by the SITSD for the LFC review.
 - 2. The Legislative Fiscal Division (LFD) determined that projects which meet the following criteria will be included on the LFC information technology project portfolio report:
 - a. Project estimate is at least \$500,000 for development. Development costs include costs for internal staff, vendor contracts, equipment, and software.
 - b. Project is included in the bill that provides resources for long-range information technology (House Bill 10).
 - c. Project is potentially of enterprise interest or need.
 - d. 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.
 - 3. A supplemental report to LFC is required for the following scenarios:
 - a. Project is re-baselined.
 - b. Project health indicator is yellow or red.
 - c. Any time an agency would like to provide supplemental information regarding a project.
 - 4. A post-implementation report to LFC is required six months after a project delivery date.
 - 5. Projects meeting the LFC reporting criteria will assign a qualified project manager to manage the project and report required data to the LFC.

V. Enforcement

- A. Establishing and Implementing Statewide IT Policies, Standards, and Procedures govern policy changes or exceptions. Submit an Action Request form to request a review or change to this instrument. Submit an Exception Request form to request an exception. Changes to policies, standards, and procedures will be prioritized and acted on based on impact and need.
- B. 2-17-514, MCA, addresses agency level enforcement information.
- C. Montana Operations Manual (MOM) Discipline Policy addresses individual level enforcement information

VI. Definitions

- A. Refer to the National Institute of Standards and Technologies (NIST) Glossary of Key Information Security Terms for a list of definitions.
- B. Refer to the PMBOK glossary for industry standard definitions.
- C. 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.
- D. Information technology is defined in 2-17-506, MCA.

VII. References

A. Legislation

- 1. Section 2-17-205, MCA
- 2. Section [2-17-505, MCA](#)
- 3. Section 2-17-506, MCA
- 4. Section [2-17-512, MCA](#)
- 5. Section [2-17-514, MCA](#)
- 6. Section [2-17-516, MCA](#)
- 7. Section [2-17-546, MCA](#)
- 8. [Montana Information Technology Act \(MITA\)](#), Sections 2-17-504 et seq., MCA

B. Policies, Directives, Regulations, Rules, Procedures, and Memoranda

- 1. Administrative Rules of Montana (ARM): [ARM 2.12](#)
- 2. NIST: [Glossary of Key Information Security Terms](#)
- 3. Statewide Policy: [Discipline Policy](#)
- 4. Statewide Policy: [POL-Information Security Policy - Appendix B \(Security Roles and Responsibilities\)](#)
- 5. Statewide Procedure: [PRO-Action and Exception Request Procedure](#)
- 6. Statewide Procedure: [PRO-Establishing and Implementing Statewide IT Policies, Standards, and Procedures](#)
- 7. [State of Montana Office of the Governor Executive Order No. 09-2016](#)