

**System Coordination Office's  
Suggested "Best Management Practices"**

**For**

**Identifying, Selecting, Appointing, and Managing a  
Project Manager**

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## **1.0 Purpose**

This guide is part of the overall project management “Best Management Practices” that have been developed by the System Coordination Office (SCO) WO-570D. It provides project sponsors with uniform guidance, requirements, and specific instructions for identifying, selecting, appointing, and managing a project manager. These existing guidelines may change as experience is gained and the Project Management framework undergoes continuous improvement.

The purpose of this guide is to provide project sponsors with specific objectives, requirements, suggestions, and procedures on identifying, selecting, appointing, and managing a project manager within the BLM, for IT Projects. It cannot provide an exhaustive treatment of the subject matter. It is strongly suggested that the sponsor of the project coordinate efforts with the SCO and HR on the selection and appointing process.

## **2.0 Applicability**

These standardized guidelines apply to *all* projects, or efforts being managed as projects, that were subject to the ITIB review process and that were approved by the ITIB.

## **3.0 Management Objectives**

The objectives of these guidelines are to describe and establish a standardized process for identifying, selecting, appointing, and managing a project manager. The guidelines described have been designed to conform to hiring or appointing policies and practices developed for the BLM.

Project sponsors that put these guidelines into practice should reduce the overall time period for identifying and selecting a project manager and will increase the chances of their projects’ success.

## **4.0 Standardized Guidelines**

### **4.1. Background Information**

Based on ITIB policy that was put in place with IM 2002-132 all national level projects should have trained or experienced IT Project managers appointed to reduce the risk and ensure the success of these highly complex projects. The SCO will assist the project sponsor in identifying and selecting a project manager that will best fit the needs of the project.

When identifying and selecting a Project Manager, there are characteristics to look for that should be displayed by the Project Manager while engaged in a Project. These characteristics include but are not limited to:

- Drive – Does the PM have a strong desire to succeed?
- Ability to Build Consensus – Can the PM get key individuals to work together towards a common ends?
- Ability to take Risks – Can the PM recognize opportunities and find ways to seize them?
- Ability to Communicate – Is the PM able to communicate clearly and convincingly to all parties?
- Experience – Does the PM have a track record of success? Look for characteristics and experiences that relate directly to the project at hand.
- Technical Knowledge – Does the PM possess demonstrated knowledge in the appropriate technical fields?
- Sense of the Big Picture – Does the PM understand the project from a broad business perspective?

Strong project leadership is one of the key ingredients in ensuring a successful project effort. Therefore, selecting the right person for the job should be given careful consideration by the project sponsors and/or stakeholders.

#### Understand the Project Subject Matter

First consider the focus of the project. Each project might require a slightly different type of Project Manager. The Project Manager should be someone who understands the basic goals of the project and is engaged enough in the subject matter to bring energy and focus to the project. This does not mean that the Project Manager has to be a subject matter expert – although this can be useful. However, it is important that the Project Manager have a credible understanding of the Project deliverables and that they are willing to do their homework on whatever subject matter the Project involves.

#### Focus on the Ultimate Customer

The Project Manager will need to be someone who understands the customers needs and is able to facilitate outreach to the customer community.

#### Engaging Team Members

The Project Manager will need the ability to understand the competencies of individual team members in order to match skill with project tasks. Part of this is ensuring that the Project Manager is able to understand and engage in the “lingo” of the team members that have specific subject matter expertise.

#### Prior Experience and Credibility

Consider the size and scope of the project. Has the proposed Project Manager handled projects of similar magnitude and priority or does this project represent a huge jump from previously assigned work.

### Availability

Finally, does the proposed Project Manager have the time to engage in leading the project. Experience shows that project managed by individuals who are over committed take longer to completed and can even fail. Therefore, it is important to ensure that the Project Manager is assigned to the project on a full-time basis, and through an agreement with the Project Manager's home unit, the Project Managers time is spent on the project and interruptions are kept to a minimum.

### **4.2. The Process**

Diagram 1 outlines steps that should be taken during the identification, selection, and appointing of a Project Manager. The red colored path is the recommended process. This path will be quicker and easier for the Project Sponsor, as all of the ground work for finding and rating a qualified Project Manager has been done.

### Managing a Project Manager

Managing a Project Manager is best accomplished through the use of Service Level Agreements (SLA) and a Project Charter. These two documents would lay out the foundation of the expectations of the Project Manager. They describe authority, rules and responsibilities, duration of the project, supervisory relations, funding sources and other guidelines that help to ensure the success of a project.

### Service Level Agreements

It is recommended that a Service Level Agreement (SLA) be prepared between the Project Sponsor, Project Manager, and the Project Manager's Supervisor, for the specific Project that the Project Manager is assigned to. This "contract" will establish a partnership between the Project Sponsor and the Project Manager's home unit providing information regarding roles and responsibilities, funding, duration, performance and evaluations, duty station, and termination of the SLA. This is a formal method of communication that provides information about the length of time the employee would be on the Project and the agreed to option for the Project Manager when the Project closes. (Refer to draft SCO BMP on Establishing a Service Level Agreement.)

### Project Charter

The Project Charter is the document that outlines the relationship between the Project Manager, the Project Team, and the Project Sponsor. It describes the Project, provides a high-level scope statement of the Project. It recognizes the existence of the Project and provides the authorization to the Project Manager and roles and responsibilities for the Project Team. It also should include; a description of the Project, time frames, budget, and Project Team members and their roles and responsibilities. (Refer to draft SCO BMP on Developing a Project Charter.)

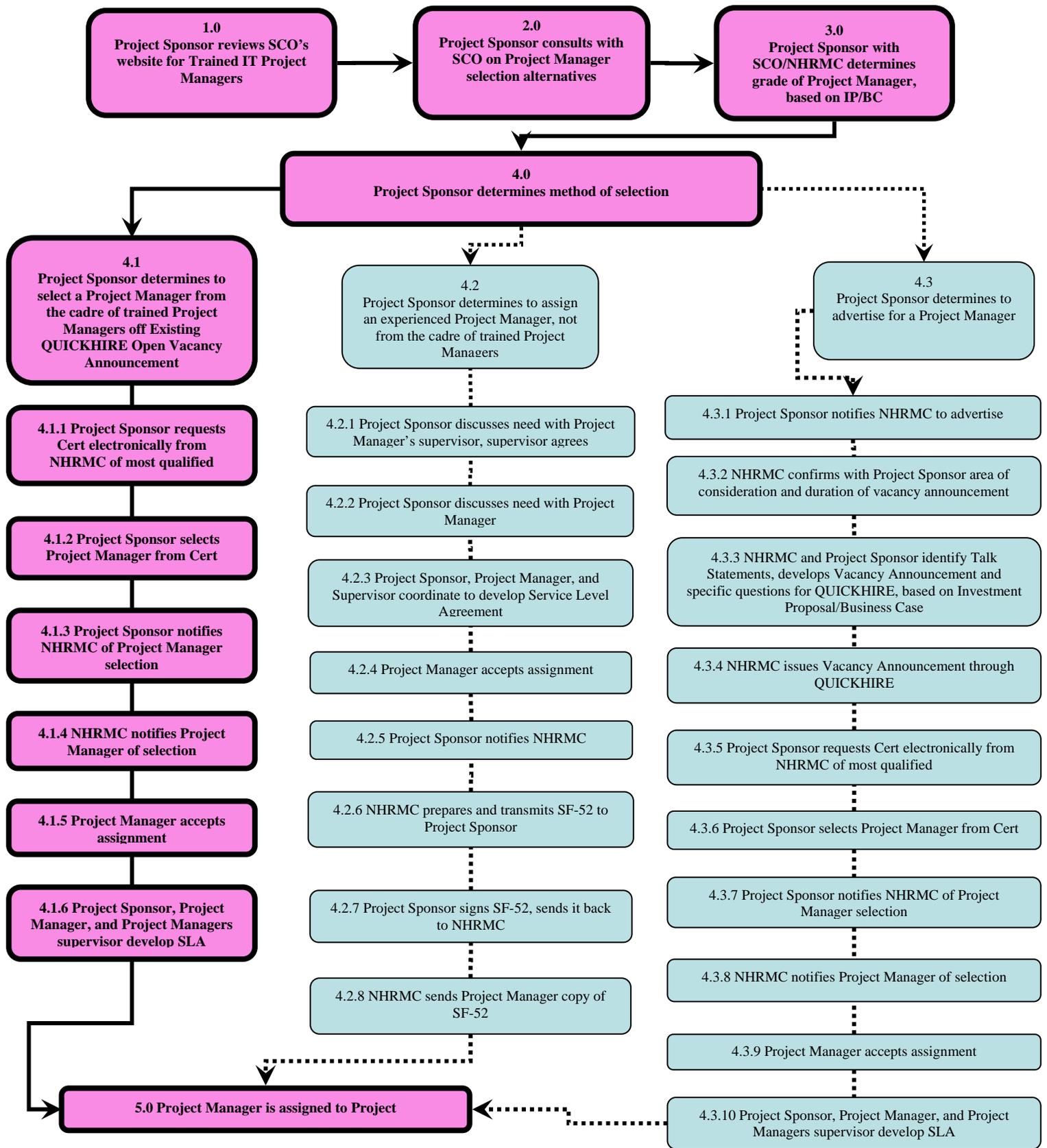


Diagram 1.

## 5.0 PM Identification, Selection, and Appointing Process

### 1.0 Project Sponsor reviews SCO's website for Trained IT Project Managers

There are currently 60 BLM employees that have received training in Project Management. They have received a Masters Certificate in Project Management from George Washington University. This list indicates the availability, areas of interest, and a short bio-sketch of each of the trained IT Project Managers.

### 2.0 Project Sponsor consults with SCO on Project Manager selection alternatives.

To ensure that every ITIB approved, national level project is being properly managed by a trained or experienced IT Project Manager, the System Coordination Office (SCO) is willing to assist the Project Sponsor by facilitating the selection and appointment process for IT Project Managers.

### 3.0 Project Sponsor with SCO/NHRMC determines grade of Project Manager, based on IP/BC.

A current certification list is available that indicates what grade level those Project Managers that applied for the list qualify for. There is a certification for a GS-12 IT Project Manager and a GS-13 IT Specialist. GS-14 level Project Managers currently are classified on a case by case basis.

### 4.0 Project Sponsor determines method of selection.

There are 3 alternatives that the Project Sponsor could employ to assign a Project Manager.

#### 4.1 Project Sponsor determines to select a Project Manager from the cadre of trained Project Managers off Existing QUICKHIRE Open Vacancy Announcement. *[This would be the preferred method of hiring a Project Manager. Not only is it quicker and easier but using a trained Project Manager increases the success of the Project.]*

These employees have taken the BLM sponsored formal training, 6 week course in IT Project Management from ESI International and have received a Master Certificate in Project Management from George Washington University. Many of which also have limited and/or considerable project management experience. The open vacancy announcement has already filtered out the qualified candidates through QUICKHIRE and NHRMC would be able to provide a list to the Sponsor of those most qualified candidates.

##### 4.1.1 Project Sponsor requests Cert electronically from NHRMC of most qualified.

This Cert would rank the most qualified applicants and provide the sponsor with a list ready for selection.

##### 4.1.2 Project Sponsor selects Project Manager from Cert.

##### 4.1.3 Project Sponsor notifies NHRMC of Project Manager Selection.

##### 4.1.4 NHRMC notifies Project Manager of selection.

##### 4.1.5 Project Manager accepts assignment.

##### 4.1.6 Project Sponsor, Project Manager, and Project Manager's supervisor develop SLA.

A Service Level Agreement is key to ensuring that the Project Manager understands his/her assignment, immediate supervisor, length of duty, and release options when the project is completed.

**4.2 Project Sponsor determines to assign an experienced Project Manager, not from the cadre of trained Project Managers.**

There are many experienced Project Managers that have not taken the formal training to receive a Masters Certificate in Project Management. Many of these employees are qualified to be assigned to an IT Project.

**4.2.1 Project Sponsor discusses need with Project Manager's supervisor, supervisor agrees.**

**4.2.2 Project Sponsor discusses need with Project Manager.**

**4.2.3 Project Sponsor, Project Manager, and Project Manager's supervisor coordinate to develop a SLA.**

A Service Level Agreement is key to ensuring that the Project Manager understands his/her assignment, immediate supervisor, length of duty, and release options when the project is completed.

**4.2.4 Project Manager accepts assignment.**

**4.2.5 Project Sponsor notifies NHRMC.**

**4.2.6 NHRMC prepares and transmits SF-52 to Project Sponsor.**

**4.2.7 Project Sponsor signs SF-52, sends it back to NHRMC.**

**4.2.8 NHRMC send Project Manager copy of SF-52.**

**4.3 Project Sponsor to advertise for a Project Manager.**

There are many employees in the BLM that have experience as a Project Manager and have not had the formal training or have not indicated interest in Project Management or are unaware that there are these opportunities available to them. By advertising for a Project Manager, the Sponsor would be able to select a Project Manager with special knowledge of the Project or special skills required by the Project.

**4.3.1 Project Sponsor notifies NHRMC to advertise.**

Using the resources and experience available from the SCO and NHRMC, the Sponsor can ensure that the proper process is followed.

**4.3.2 NHRMC confirms with Project Sponsor area of consideration and duration of vacancy announcement.**

**4.3.3 NHRMC and Project Sponsor identify Task Statements, develops Vacancy Announcement and specific questions for QUICKHIRE, based on Investment Proposal/Business Case.**

With QUICKHIRE a very specific set of questions can be incorporated into the vacancy announcement that would enable the Project Sponsor to receive only those applicants that are being sought after (e.g. Trained Project Managers, BLM Only employees, local commuting area, X number of years experience). The previous list of characteristics of quality Project Managers can be used to select a Project Manager develop specific questions.

**4.3.4 NHRMC issues Vacancy Announcement through QUICKHIRE.**

- 4.3.5 Project Sponsor requests Cert electronically from NHRMC of most qualified.**
- 4.3.6 Project Sponsor select Project Manager from Cert.**
- 4.3.7 Project Sponsor notifies NHRMC of Project Manager selection.**
- 4.3.8 NHRMC notifies Project Manager and SCO of selection.**
- 4.3.9 Project Manager accepts assignment**
- 4.3.10 Project Sponsor, Project Manager, and Project Manager's supervisor develop SLA.**

A Service Level Agreement is recommended to avoid miscommunications between the Project Manager, Sponsor, and the Project Managers Supervisor. This outlines, among other items, the timeframe of the Project and the options available to the Project Manager once the Project is complete.

**5.0 Project Manager is assigned to Project.**

## Referenced Documentation

- Expediting the IT Project Manager selection and temporary assignment process. Information Technology Investment Board Issue Paper. March 12, 2002. SCO WO-570.
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