# OE PROJECT MANAGEMENT GLOSSARY

**ACCEPTANCE CRITERIA** : those criteria, including performance requirements and essential conditions that must be met before the project deliverables are accepted.

**ACTIVITY:** an action necessary to achieve a project task and is the smallest unit of project work.

**ASSUMPTIONS:** factors that, for project planning purposes, are considered to be true and do not require proof.

**BUDGET:** the approved funding estimate for completing the full scope of project work described in the work breakdown structure.

**BUSINESS CASE**: a written document that describes the reasons for initiating a project; it also describes the resources, such as money, staff time, and equipment, that are required to achieve the specific business goals.

**CHANGE CONTROL:** the process of identifying, documenting, approving or rejecting changes to the project plan.

**CHANGE MANAGEMENT:** is a structured approach to shifting/transitioning individuals, teams, and organizations from a current state to a desired future state. It is an organizational process aimed at empowering employees to accept and embrace changes in their current business environment.

**CHANGE MANAGER:**   plays a key role in helping projects meet business, schedule and budget objectives. The Change Manager role focuses on the people side of change – including changes to business processes, systems and technology, job roles and organization structures. The primary focus will be creating and implementing change management plans that minimize employee resistance and maximize employee engagement. The Change Manager will work to drive faster adoption, greater ultimate utilization and higher proficiency on the changes impacting employees in the organization such that business results are achieved.

**COMMUNICATIONS MANAGEMENT PLAN**: a document that describes the communications needs for a project. It describes:

- how, when, and in what form project information will be distributed
- who will receive the information and the kinds they will receive.
- who is responsible for preparing the information

**CONSTRAINT:** a restriction which is either internal or external to the project that will restrict the performance of the project. For example, a fixed amount of money allotted for a project budget is a cost constraint, and a set date by which a project must be completed is a time constraint.

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**CRITICAL PATH**: the chain of linked dependent project tasks in a project network diagram that has the longest required completion time. The end date of a project is dictated by the tasks that make up this critical chain of tasks. Any change to the time required to complete a task on the critical chain will impact the overall completion date of the project.

**DECOMPOSITION:** a planning method that divides the project scope and deliverables into smaller, more manageable parts, until the work associated with each part is defined in adequate detail so that members of the project team can execute, monitor, and control all of the tasks required to fulfill the project scope.

**DELIVERABLE:** any measurable, tangible, verifiable outcome, result, or item that must be produced to complete a project milestone.

**DURATION:** the period of time over which a task is completed. The duration of a task may be dependent on or independent of the resources assigned to perform the task. If a task has a fixed duration, its duration is not affected by the amount of resources assigned to the task.

**FLOAT (SLACK):** the amount of time that a task in a project network diagram can be delayed without causing a delay to:

- subsequent tasks (free float)
- project completion date (total float)

An activity that has a total float equal to zero is said to be a "critical activity", which means that a delay in the finish time of this activity will cause the entire project to be delayed by the same amount of time.

**FOCUS GROUP:** a form of qualitative research in which a group of people are asked about such things as the business issues or functionality of a specific service or product.

**FUNCTIONAL OWNER:** is responsible for the management of the design of the project deliverable (outcome) with respect to business workflows, design of associated system components, design of appropriate system content, and the effective delivery and deployment of the full solution to end users.

**GANTT CHART:** a popular type of bar diagram that illustrates a project schedule. Gantt charts illustrate the start and finish dates of the terminal elements and summary elements of a project. The tasks and milestones in the Gantt chart are taken from the work breakdown structure of the project. Some Gantt charts also show the dependency relationships between activities and can be used to show the current schedule status of a project.

**LAG:** the amount of time after one task is started or finished before the next task can be started or finished.

Lessons Learned: the learning gained from the process of performing a project. Lessons may be learned during any phase of the project and should be documented so other project teams can benefit from the knowledge gained.

**MILESTONE:** a scheduled event signifying the completion of a major deliverable or a set of related deliverables. Typically, the project will be divided into five to ten major milestones. Each milestone has a deliverable and a completion date associated with it, and has acceptance criteria in the description of a deliverable.

**PORTFOLIO MANAGEMENT:** the centralized management of one or more project portfolios, including the identification, prioritization, authorization, management and control of the projects, to achieve specified organizational goals.

**PROGRAM:** a group of related projects managed in a coordinated manner to obtain the benefits that could not be achieved by managing them separately.

**PROGRESSIVE ELABORATION:** the process of continuously improving and refining a project plan as more information becomes available to the project team. This iterative process allows the project team to create better estimates and more complete plans as the project proceeds.

**PROJECT:** a temporary and one-time undertaking that has the following five characteristics:

- is a one-time event
- creates unique products or services
- has time and cost constraints
- is completed against certain specifications (requirements)
- has a defined start and end date
- consumes resources (e.g., money, people, material, and equipment)

**PROJECT ACCEPTANCE REPORT:** a document that is used to confirm that the deliverables of the project, as stated in the project charter, meet the specified acceptance criteria described in the charter. The official customer for the project evaluates and signs off on each deliverable.

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**PROJECT CHARTER:** a statement of the scope, objectives, and participants in a project. It provides:

- a description of the project objectives
- a list of project assumptions
- a description of project scope
- a list of project milestones
- a list of key project stakeholders
- a description of the roles and the responsibilities of the project team members and other key stakeholders
- a description of project funding and other resources
- a list of high-level project risks
- authority of the project manager
- approval of the charter by the project's sponsor

The charter is signed by the sponsor to authorize the project to commence and use the specified resources.

**PROJECT MANAGEMENT:** the discipline of organizing and managing resources (e.g., people, money, materials, and equipment) in such a way that the project meets:

- the defined project scope
- the time and cost constraints
- the functional requirement and technical specifications
- the customers' expectations
- the required quality set forth in the project scope

**PROJECT MANAGEMENT OFFICE (PMO):** a department that an organization can establish to define and maintain the standard practices that it uses for project management. By introducing standardized and repeatable practices, the PMO seeks to improve the success of an organization's projects. A PMO is also the source of documentation, guidance, and metrics on the practice of project management. It may also be responsible for centrally managing projects under its supervision and helping an organization's leadership to evaluate proposed strategic projects.

**PROJECT MANAGEMENT PROFESSIONAL** (PMP): a certification in project management offered by the Project Management Institute.

**PROJECT MANAGER:** a temporary position held by the person responsible for the overall project management process and ultimately, for the success of the project. The project manager has the following responsibilities:

- **PROCESS RESPONSIBILITIES**
    - Identifies, tracks, manages and resolves project issues.
    - Proactively disseminates project information to all stakeholders.
    - Identifies, manages, and mitigates project risk.
    - Ensures that the solution is of acceptable quality.
    - Proactively manages scope to ensure that only what was agreed to is delivered, unless changes are approved through scope management.
    - Defines and collects metrics to measure the project's progress.
    - Manages the overall schedule to ensure work is assigned and completed on time and within budget.

- **PEOPLES RESPONSIBILITIES**
    - Serves as the project team leader. Project leadership is about communicating the vision of the project and getting the team to accept it and strive to achieve it.
    - Ensures the project team members follow the standard processes and procedures.
    - Sets reasonable, challenging, and clear expectations for team members, and holds them accountable for meeting the expectations. This includes providing good performance feedback to team members.
    - Employs team-building skills so that the people work together well, and feel motivated to work hard for the sake of the project and their team members.
    - Uses proactive verbal and written communication skills, including good, active listening skills.

**PROJECT METHODOLOGY:** a set of specified practices, techniques, and rules used in project management. The most common project methodology used in the United States is the one created by the Project Management Institute. This methodology is composed of five phases:

1. **INITIATION** — involves the analysis of a proposed project, definition of the preliminary project scope, creation of the project charter, and approval of the project charter by the sponsor.

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2. **PLANNING** — involves the creation of the project management plan including:

   o   a mature work breakdown structure
   o   a project network diagram
   o   a project work schedule
   o   a risk management plan
   o   a project communications plan

3. **EXECUTION** — involves the project team performing the work of the project as specified in the project plans.

4. **MONITOR AND CONTROL** — involves measuring the progress of the work conducted during the execution phase of a project to ensure the project team is meeting performance objectives and taking corrective actions as needed to achieve the project objectives.

5. **CLOSURE** — involves all the processes required to terminate project activities and transfer the products and services created by the project to operations. Also includes documenting the lessons learned from the project and archiving the project documentation.

For some projects, these phases are conducted as separate sub-projects. For example, the five phases may be divided to three separate sub-projects conducted in the following sequence:

1. Initiation
2. Planning
3. Execution, Monitor and Control, and Closure

At the end of the each sub-project, appropriate organizational leaders will decide if the project team should carry out the next proposed sub-project.

**PROJECT METRICS:**  a way to measure if a project is being developed on time and on budget by tracking the progress of project milestones.

**PROJECT MILESTONE:**  a scheduled event signifying the completion of a major deliverable or a set of related deliverables for a project.

**PROJECT  NETWORK DIAGRAM:** a schematic depicting the sequence in which a project's tasks are to be completed and the interdependencies among the project tasks.

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**PROJECT OBJECTIVE:** describes the business objective that the project seeks to address; explains how the project will add value to the organization and what strategic priorities are being addressed.

**PROJECT PHASE**: a set of logically related project activities to accomplish the completion of a major project deliverable. Phases are usually completed sequentially but will sometimes overlap.

**PROJECT PORTFOLIO:** a collection of projects that are grouped together to achieve the strategic business objectives of an organization.

**PROJECT REQUIREMENT:** a function or condition that must be met by a product, system, or service as specified in the project plans and contracts.

**PROJECT SCOPE:** defines the boundaries of the project. The scope describes what will be delivered where, when, and how. It describes the services, functions, systems, solutions, or tangible products for which the sponsor will take delivery. The scope should include:

- the major objectives that the project is expected to accomplish
- the key time, financial, technical, and legal constraints
- the significant assumptions

**PROJECT STATUS REPORT:** communicates the status of a project. This report is a tool for project managers to:

- inform stakeholders about the progress of the project
- raise issues
- request assistance as needed

Project status reports are usually prepared and distributed on a weekly or bi-weekly basis.

**PROJECT TEAM:** a group of people working together on a common goal, the accomplishment of a successful project. Typically, a project team consists of a project manager and one or more subject matter experts divided into three to twelve core and extended team members.

- Core Team Member: typically owns one or more project deliverables and is dedicated to the project full time.
- Extended Team Member: provides part-time support for specific project tasks.

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**RADIO LIST:** a document that is used during a project meeting to capture issues that cannot be resolved during the meeting but should be remembered and addressed by the project team. The term RADIO is an acronym for the five categories used to classify the issues:

- Risks
- Assumptions
- Definitions
- Issues
- Opportunities

**RAPID ANALYSIS:** is an organizational design tool used to codify individuals' roles in making decisions to improve decision-making processes, increase overall decision effectiveness, and eliminate unnecessary costs.

**RESERVE:** a portion of the project budget reserved by the project manager and sponsor to mitigate project risks.

**RISK:** an uncertain event or condition that, if it occurs, has a negative effect on a project's objectives. The project team devises plans to identify and mitigate risks based upon the probability and impact of the events.

**RISK ASSESSMENT:** the determination of quantitative or qualitative value of risk related to a specified situation and an identified threat to the project. Risk assessment is a common first step in a risk management process.

**RISK MANAGEMENT**: a structured approach to managing project uncertainty through a sequence of activities including risk identification and assessment. Project team members develop strategies to manage and mitigate risks based upon the probability of the risk occurring and the impact to the project if the risk event occurs. These risk management strategies include:

- transferring the risk to another party
- avoiding the risk
- reducing the negative effect of the risk.
- accepting some or all of the consequences of a particular risk

**RISK REGISTER (RISK LOG):** a tool commonly used in project planning that contains information on all of the project risks identified by the project team including:

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- a description of the risks
- a summary of the analysis of the risk including the probability of the risk occurring and the impact to the project if it occurs
- plans to respond to the risk

**SPONSOR:** the person who has ultimate authority over the project. The sponsor provides project funding, resolves issues and scope changes, approves major deliverables, and provides high-level direction. The sponsor position ends when the project is complete. As a practical matter, the project sponsor needs the project deliverables, and typically provides the funding to get the job done. For internally driven projects, the sponsor may not pay for the project but is recognized as the owner of the project along with the utilized resources. The project manager looks to the project sponsor to provide the required help to acquire needed resources and to help navigate the project politics, especially the blending of stakeholder requirements.

**STAKEHOLDER:** any person or group that is affected by the execution and success or failure of a project. This includes team members, resource owners, end users, and operational owners of the project outcomes. A project's sponsor is the most important stakeholder.

**STEERING COMMITTEE:** represents the critical stakeholder groups in the overall governance of a project, program, or functional area: review and advise the project charter for quality, accuracy and strength of business case; review progress against the project plan; review and recommend changes to the business case; review and recommend major changes to project resourcing, timelines, scope, objectives, costs, etc.; participate in the identification of project risks and mitigation plans; identify the impact on campus systems and processes; resolve escalated project issues; resolve conflicts between stakeholder groups; resolve issues that cross departmental boundaries; cultivate cross departmental collaboration; provide support and guidance for sensitive political issues; raise policy issues for consideration and resolution; and review project status and the achievement of project milestones.

**SUCCESS MEASUREMENT:** a metric that helps the project team determine if project deliverables will meet the expectations of the stakeholders. These metrics can also be used to gauge the status of the scope, cost, and delivery date. A properly designed set of success measurements can provide the team with early notice of emerging problems so action can be taken to mitigate them.

**TASK:** an action necessary to achieve a project milestone. The work involved to achieve a task is further broken out into activities.

**TASK DEPENDANCY:** refers to whether a task can be performed in isolation or must wait to be performed after another task is finished or started. For example, before you can pour a glass of water, you need a glass and water source.

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**TRIPLE CONSTRAINTS:** a common model for looking at the relative priority and interdependence of a project's constraints of time, cost, and scope. The sponsor defines the priority of each of these constraints in a project.

**WORK BREAKDOWN STRUCTURES (WBS):** a project management tool used to divide the total project scope into manageable pieces of work. It is typically presented as an outline or a tree diagram. The higher levels of a WBS describe deliverables and planned outcomes, and the lowest level of the WBS describe the tasks required to complete the deliverables and outcomes. The work breakdown structure is used to create the work schedule.

**WORK PLAN (SCHEDULE):** a project document that describes the milestones, tasks, activities, deliverables, and related information that are significant to the project. These key elements of a project work schedule must be completed on-time and on-budget for a project to be successful and therefore require monitoring by the project manager and stakeholders. The status of the project work schedule is reported in the project status report.