Policies for CMAP Project Management (Preliminary)

Statement of Policy: It is the general policy of the Chicago Metropolitan Agency for Planning (CMAP) to establish consistent and efficient procedures for project managers and teams to effectively plan, execute, and monitor their respective projects.

Statement of Purpose: The purpose of this policy is to establish procedures for the initiation, planning, staffing, communication, and monitoring of projects across the agency. Implementation of these procedures is necessary to reach the overall goal of increasing efficiency and effectiveness agency-wide. As CMAP currently transitions to a new "matrix" organizational structure, project managers are expected to assume a greater level of authority and accountability over agency work, while simultaneously operating and communicating within their functional departments.

Statement of Procedure:

- **Project Plan.** Under a standardized format (*template to be provided*), project managers should develop a project plan including scope, work breakdown structure, list of deliverables and associated dates, timeline, and means of team communication for each project. Project plans should be delivered to the Project Administrator and the PM's DED for review.

- **Project Teams.** In consultation with the relevant DED, PMs should develop a complete list of staff members comprising their project team, with an estimate of "person-months" required of each staff member. This should be included in the project plan. Modification to project teams should be made in consultation with the relevant DED, and any changes should be submitted in writing (using the Time Charge Adjustment form) to the Project Administrator.

- **Project Management Software.** Once Project Management software is evaluated, selected and implemented (including training for PMs), project managers will be required to utilize this software for planning and executing their projects. Standards for software use will be established.

- **New Grants.** Before applying for any new grant from any outside funding source, CMAP employees must first complete the "Initiation of Process" form which documents the following: name of potential funding source, funding amount, brief 1-paragraph description, preliminary timeline and preliminary list of CMAP staff complete the work. This document must be approved by both the respective DED and executive director prior to the filing of any grant application.

- **Grants and Contracts Procedures.** Project Managers are expected to abide by the CMAP *Grants and Contracts Procedures* for the initiation, negotiation, and acceptance of grants and contracts. The decision to pursue any grants or contracts rests with the executive director.

- **Purchasing Policy.** Project Managers are expected to abide by the CMAP *Purchasing Policy* for purchasing supplies, services, and equipment.

- **Reporting on Projects.** On a bi-weekly basis concurrent with timesheet submittal, every CMAP staff member will be responsible for submitting a short progress report (*template to be provided*). This documentation is vital to the agency as a mechanism to monitor project progress. On a quarterly basis in consultation with project managers, the Project Administrator will distill this information into an overall progress report, which will be disseminated to the CMAP Board for their information.

  Examples of information to include in these reports:

  - Any work accomplished toward project milestones.
  - Brief synopses of any internal team meetings or external meetings with stakeholders.
  - Any other notable achievements or challenges.
  - If there is nothing to report on a particular project, simply state "nothing to report".

  These reports should be dated and submitted in a timely fashion (on or close to the day of timesheet submittal) in **S:\Projects\FY 08\PM Project Reports**.

- **Quarterly Meetings.** Project Managers are expected to meet once every three months, shortly after the end of each quarter, in tandem with the Project Administrator, Chief of Staff, and DED(s) to discuss progress and any other issues related to particular projects. These meetings will focus primarily on information contained within the bi-weekly progress reports.