

Active Project Transition Process

The Active Project Transition Process was designed to help projects that have already begun the Planning or Execution Phase, to begin using the Project Management Methodology's (PMM) formal processes and templates.

The Active Project Transition Document should be completed by the assigned Project Manager. The Project Manager will be instrumental in acquiring the necessary approvals and/or signatures for this document. Information should be gathered from existing project documentation, as well as information from project team members.

Usage Criteria

The Active Project Transition Process may be utilized if the project is currently underway. The project being transitioned to the PMM is typically in its mid to late planning stages, or early execution. It is advised that projects in the early to late initiation stage or in the early planning stage should use the full PMM, including the use of the Project Concept Document and Project Charter.

Projects in mid to late execution stages may be better off staying with the current methods and processes in use. This decision needs to be made by the Project Manager, the project sponsor, and other project stakeholders.

Eligible Projects

The following circumstances may precipitate the use of the Active Project Transition Process:

- A project that has been ongoing and active prior to the agency's adoption of the PMM.
- A project that has been transferred from an area that has not implemented the PMM to an area where the PMM is in use on all projects.
- An effort has grown from a "task" or an "activity" to a full scale project without project participants realizing it.

Keep in mind that other projects may be eligible for the Active Project Transition Process as well, and need to be evaluated on a case by case basis.

**Expectations for Projects
Transitioned to the PMM**

After the Project Manager has utilized the Active Project Transition Process using the provided template, it is assumed that the PMM will be followed from that point on, processes and templates in the remaining project phases be followed, including:

- Remaining Project Planning activities/processes
- Remaining Project Execution and Control activities/processes
- Closeout activities/processes

**Description of the Active
Project Transition
Template**

The template is broken into 13 main areas, as follows:

- A. General Information
- B. Business Problem
- C. Project Goals
- D. Critical Success Factors
- E. Project Scope
- F. Project Impact
- G. High Level Project Plan
- H. Deliverables
- I. Resources
- J. Financial Information
- K. Schedule Information
- L. Current Status
- M. Risk
- N. Project Review and Approval

The user of this template may make alterations based upon the progress of the project being transitioned. The templates for creating Active Project Transition Documents are available on the following pages.

Active Project Transition Document

Project Name: **Date:**

Agency: **Modification Dates:**

Prepared by:

A. Purpose

Information in this section discusses the reasons that the Active Project Transition Document has been created and provides an overview of the project. Note, documentation that addresses any of the information requested in any of the following sections can be referenced or attached.

B. Business Plan

Describe the business problem or issue that required resolution and the impact of the business problem or issue on the agency. Identify any negative consequences to the agency that would have occurred if the project had not been implemented.

C. Project Goals

Identify the expected outcomes of the project.

D. Critical Success Factors

Identify the critical success factors (metrics or measures) of the project that define project success.

E. Project Scope

Define the scope of the project that includes identification of what is to be included in the project and what is not to be included in the project. If different from the initial project scope, please explain.

F. Project Impact

Identify the organizational areas, information systems and other projects impacted by this project.

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G. High Level Project Plan

Identify the high-level activities that were identified to complete the project. Indicate whether each activity has not started, has started, or has been completed. If an activity has been started but not completed, indicate the percent complete.

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H. Deliverables

Identify the deliverables of the project. Indicate whether each deliverable has been completed and accepted. If a deliverable has not been completed and accepted, indicate the percent complete.

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I. Resources

Identify the internal and external resources that are currently, or planned to be, utilized during the project. Include effort hours by time period for each identified resource.

Personnel Category	Resource Name	J	F	M	A	M	J	J	A	S	O	N	D
Project Manager													
Project Coordinator													
Programmers													
Senior													
Junior													
Technicians													
Senior													
Junior													
Quality Assurance													

Other													
Other													

For external resources, identify the name of the external resource (vendor). For each external resource (contract) being used, define the scope of the services to be provided. Also, outline the terms and conditions of the contract such as the amount of the contract, the contract effective period, payment terms, etc.

J. Financial Information

Identify the budget for each of the milestones included in the acquisition or development, implementation and ongoing maintenance of the project. For each of these milestones, identify the funding status (not currently funded, fully funded or partially funded). Also identify the funding source (general fund, grant fund, etc.). If funded with a combination of funds, identify the percent allocation.

Milestone	Budget	Funding Status	Funding Source
Milestone 1			
Milestone 2			
Milestone 3			
Milestone 4			
Milestone 5			
Milestone 6			
Total Project			

Document any assumptions made while developing the project budget and current status.

K. Schedule Information

Identify the schedule for each of the milestones included in the acquisition or development, implementation and ongoing maintenance of the project.

Milestone	Duration	Est. Start Date	Est. Completion Date
Milestone 1			
Milestone 2			
Milestone 3			
Milestone 4			
Milestone 5			
Milestone 6			
Total Project			

Document any assumptions made while developing the project schedule and current status.

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L. Current Status

Provide an update regarding the current status of the project, which includes a description of significant accomplishments to date. Also, include the current status of the budget (estimated versus actual costs) and schedule (estimated versus actual duration of each milestone).

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M. Risk

Describe any potential risks that may occur and the impact (positive or negative) on the project if the risk occurs. For each potential risk, identify the probability (likelihood of occurring, expressed in a percentage) of occurrence, and if quantifiable, the impact or potential cost if the risk occurs.

Risk	Probability of Occurrence	Impact

Describe actions that can be taken to prevent the risks identified above from occurring and any associated costs of the prevention strategies.

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Document any comments or concerns pertaining to the project.

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N. Signatures

Signing below indicates that the respective organizational areas agree with the project as outlined above. Signatures should be obtained from the Project Manager; business areas impacted by the project in that they are responsible for providing resources for the successful completion of the project; and Sponsor(s).

Name/Title	Signature	Date