



# VIRGINIA IT AGENCY

## Commonwealth IT Project Manager Overview

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VITA Project Management Consultant

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# INTRODUCTION

## Welcome!

1. Name
2. Agency
3. Length of time with Commonwealth
4. A trip you've got planned or been on recently

## Agenda

- Go over background and policies to explain where project Oversight and Governance (O&G) was derived from and clarify the responsibilities of PMD
- Explain what an individual needs to accomplish to be qualified as the Project Manager on a Commonwealth-level project
- Highlight the difference between Group 1 and 2 agencies
- Cover the different category levels for projects and what documentation is required for each category
- Review a project's lifecycle and explain each phase in detail from Investment Business Case to Project Closeout

# Background and Policies



## HOW DID WE GET HERE?

- In January 2003, the Joint Legislative Audit and Review Commission (JLARC) completed a study that identified a history of Commonwealth IT project failure.
- Why were the Commonwealth IT Governance and Oversight model and the Commonwealth Project Management (CPM) methodology initiated?

### IT Project Failure!

- Projects were poorly funded or ill-conceived
- Projects were not supported by stakeholders
- Agencies applied an immature or inappropriate technology
- Projects did not use a proven project management methodology
- Agencies did not have an experienced and skilled project manager
- No clear connection between the project and agency objectives
- Projects had no clear return on investment

# IT GOVERNANCE AND OVERSIGHT KEY TERMS

## Governance

The development and management of consistent, cohesive policies, processes, and decision-rights for a given area of responsibility.

## Oversight

Management by overseeing the performance or operation of a person or group.

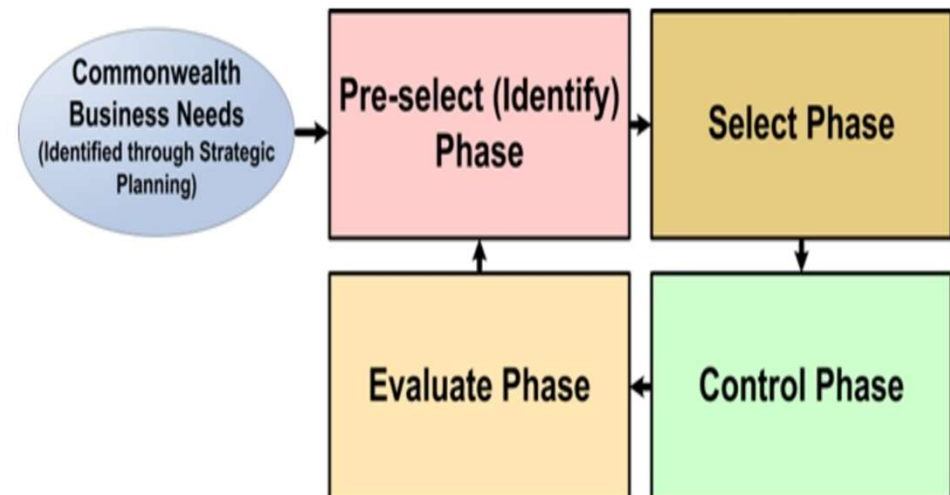
## IT GOVERNANCE AND OVERSIGHT

IT Investment Management (ITIM)	Project Management Division (PMD)
Strategic investment planning	Project-level governance
Evaluates IT investments	Reviews and monitors IT projects
Ensure alignment with business needs and values	Ensures compliance with standards and best practices
Supports budgeting and prioritization	Provides training, consulting, and oversight
<b>Focuses on the “what”</b>	<b>Focuses on the “how” of project execution</b>

# UNDERSTANDING ITIM: INFORMATION TECHNOLOGY INVESTMENT MANAGEMENT (ITIM)

How the Commonwealth manages IT investments

- A structured process for managing IT investments
- Helps agencies make smart, business-driven IT decisions
- Focuses on value, risk, and performance



# IT GOVERNANCE AND OVERSIGHT

ITIM is responsible for:

- Agency IT Strategic Planning
- Commonwealth Technology Portfolio Tool (CTP)/Planview E1
- Recommended Technology Investment Projects (RTIP) Reports
- Agency IT procurement reviews (PGRs)
- Investment Business Case approvals
- Technology Management policy, standard and guideline development
- CIO, Information Technology Advisory Council (ITAC) and Sec. of Administration support

# BUSINESS REQUIREMENTS FOR TECHNOLOGY

## **BReT: Business Requirements for Existing Technology**

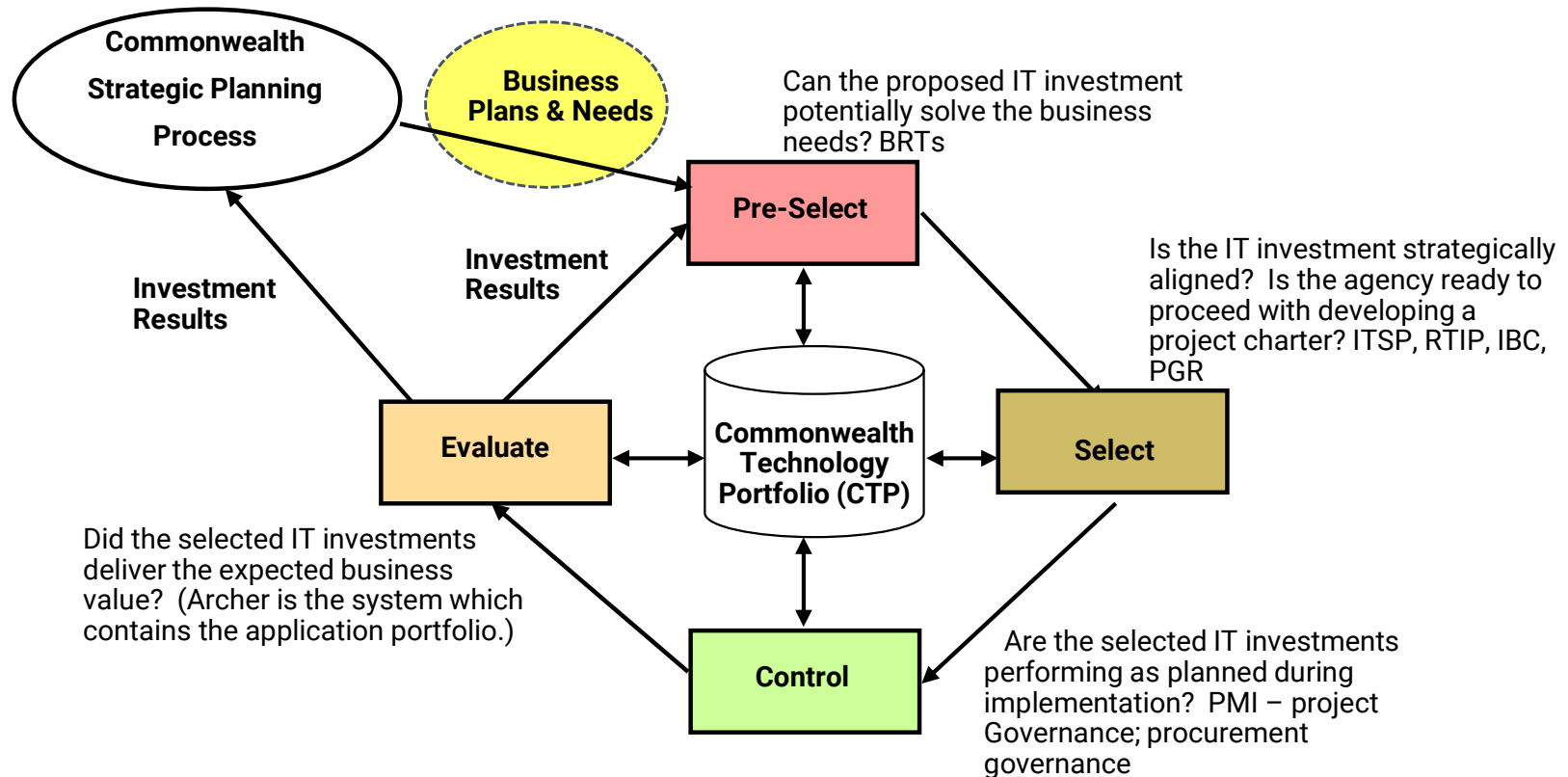
- Supports or maintains **current systems**
- Examples:
  - Software or hardware upgrades
  - Contract renewals
  - Maintaining legacy applications

## **BRnT: Business Requirements for New Technology**

- Supports **new business functions**
- No current tech solution in place
- Examples:
  - Adding new features to an app
  - Implementing new systems
  - Reorganizing business processes

# WHAT IS ITIM

ITIM is a methodology for managing IT Investments



## COMMONWEALTH TECHNOLOGY PORTFOLIO (CTP)



The Commonwealth Technology Portfolio is built on Planview E1 and is an online repository for agency information technology investments in the Commonwealth. Information from the system is used to:

- Support both Commonwealth and agency IT strategic planning
- Better inform and standardize the overall Commonwealth IT Investment Management process
- Improve IT investment decision making
- Allow agencies to share information about their current portfolios

## IT GOVERNANCE AND OVERSIGHT-PMD

Under the direction of the Secretary of Administration and the Commonwealth Chief Information Officer (CIO), the Commonwealth Project Management Division (PMD) implements an enterprise strategy for the effective and efficient management of information technology investments.

PMD responsibilities:

- Agency project oversight and reporting
- Project approvals and closure
- Agency project management training, consulting, and assessment
- Independent Verification & Validation (IV&V)



Unlike most state agency divisions, the roles and responsibilities of PMD are established in the *Code of Virginia*.

## PMD CONSULTANTS

Name	Email
Melissa Mutter (Manager)	melissa.mutter@vita.Virginia.gov
Chris Chappell	chris.chappell@vita.virginia.gov
Patty Samuels	Patty.Samuels@vita.virginia.gov
Christopher Crowder	Christopher.Crowder@vita.virginia.gov
Donny Oakes	Donald.Oakes@vita.virginia.gov
Anika Moore	Anika.Moore@vita.virginia.gov

## PROJECT CATEGORIES

Commonwealth Level Project Categories 1-4				
		Complexity:		
		High	Med	Low
Risk:	High*	1	1	1
	Med	2	2	3
	Low	3	4	4
Limited Oversight and Agency Level Project:		n/a	n/a	n/a

# IT Project Manager Qualifications



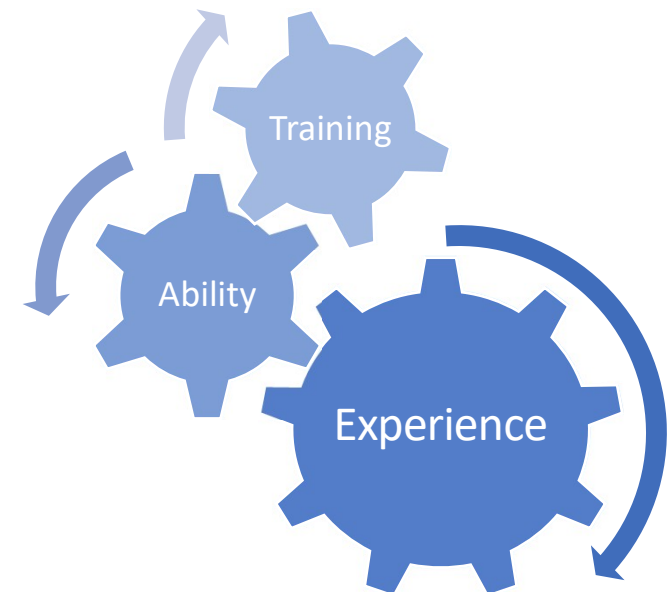
## PROJECT MANAGER QUALIFICATION-OBJECTIVES

- Improve project management performance
- Establish a community of qualified IT Project Managers with appropriate balance of training and experience
- Address *Code of Virginia* mandate

§ 2.2-2008. Additional duties of the CIO relating to **project management**.

The CIO shall have the following duties relating to the management of information technology projects:

§ 2.2-2008.2. Establish minimum qualifications and training standards for project managers.



## PROJECT MANAGER QUALIFICATION

- The Project Manager Selection and Training Standard requires the project manager candidate to successfully pass two qualification exams – Level One and Two. (Depends on category of the project)
- Project Management Professional (PMP®) certification from the Project Management Institute supersedes the requirement for Level Two.
- Complete this class

## PROJECT MANAGER QUALIFICATION-EXAM

Level One Exam: Managing IT projects in the Commonwealth:

The Commonwealth Project Manager Qualification Level One exam is required for all Project Managers managing Commonwealth IT projects in Categories 1-4.

### **Exam Study Materials:**

COV ITRM Project Management Standard CPM 112-04.8, July 2024  
COV ITRM Project Manager Selection and Training Standard CPM 111-05, April 19, 2022

**Format:** 50 multiple-choice questions

# PROJECT MANAGER QUALIFICATION-EXAM

## Level Two Exam: Project Management Principles

The Level Two exam is required for Project Managers managing Category 1-3 Commonwealth IT projects and is only required for those who do not hold a current PMP certification.

### **Exam Study Materials:**

PMBOK® Guide - Seventh Edition  
Process Groups: A Practice Guide  
Agile Practice Guide - First Edition

**Format:** 50 multiple-choice questions

## HIGH RISK PROJECT MANAGERS

- Project managers assigned to high-risk projects must meet the following criteria:
- Active PMI Project Management Professional (PMP) or PMI Agile Certified Practitioner (ACP) certification
- Documented risk management experience
- Completion of a CAT 1 or 2 Commonwealth project of \$5M or more, or completion of a non-COV project with a value greater than \$10M as PM of record.

## HIGH RISK PROJECTS

A project is classified as high-risk if:

- Cost exceeds \$10 million, or
- Cost exceeds \$5 million and any of the following apply:
  - Involves 2 or more agencies
  - Lasts more than 5 years
  - Agency lacks recent experience with similar projects

Important notes:

- Projects over \$10M are not eligible for categories 2, 3, or 4
- PMD/CIO approval is required for assigning the project manager

## MAINTAINING PM PROFICIENCY

Commonwealth IT PM Qualification becomes dormant 3 years after:

1. Successfully passing PM Qualification Exam – Level One

**Or, if applicable,**

2. The closeout date of a Commonwealth-level (Category 4, 3, 2, or 1) IT project in which the candidate was the designated PM

## PROJECT MANAGER QUALIFICATION RECORD (PMQR)

The **Project Management Qualification Record (PMQR)** is a tool used by project managers in the Commonwealth of Virginia to document their training, education, and project experience. It helps demonstrate that they meet the qualifications required to manage Commonwealth IT projects, based on the standards outlined in the state's official Project Manager Selection and Training Standard.

**PMQR** BEST PRACTICES / LESSONS LEARNED REGISTER FOR CLASS MY INFO EXAMS

### Edit User -

**General**

Organization: VITA  
 Department: PMD  
 Occupation Title: PM Consultant  
 Education Level: Masters  
 Alt Phone: 8049865976  
 User Type: PM  
 Supervisor: Supervisor is/et in the list?

Street 1: 7325 Beaufort Springs Drive  
 Street 2:  
 City: Richmond  
 State: VA  
 Zip: 23225

Save Cancel

**VITA Classes** Register for Class

Class	Status	Date	Pass/Fail
CTP Planview E1 Project Manager Training	ENROLLED	10/15/2025	P
Commonwealth IT Project Manager Overview Training	ENROLLED	10/01/2025	P

## RECAP

- Everyone takes exam 1
- Exam 2 required for Cat 1, 2, or 3 (W/O PMP)
- Everyone takes this class
- Test is free and administered through VITA's PMQR system
- Open book – open notes
- Keep PMQR updated with experience and trainings you complete
- VITA webpage for more information

# IT Project Management Policies, Standards and Guidelines (PSGs) and Project Lifecycle



## VITA PSG's

Commonwealth Project Management Guideline (CPM 110-05)

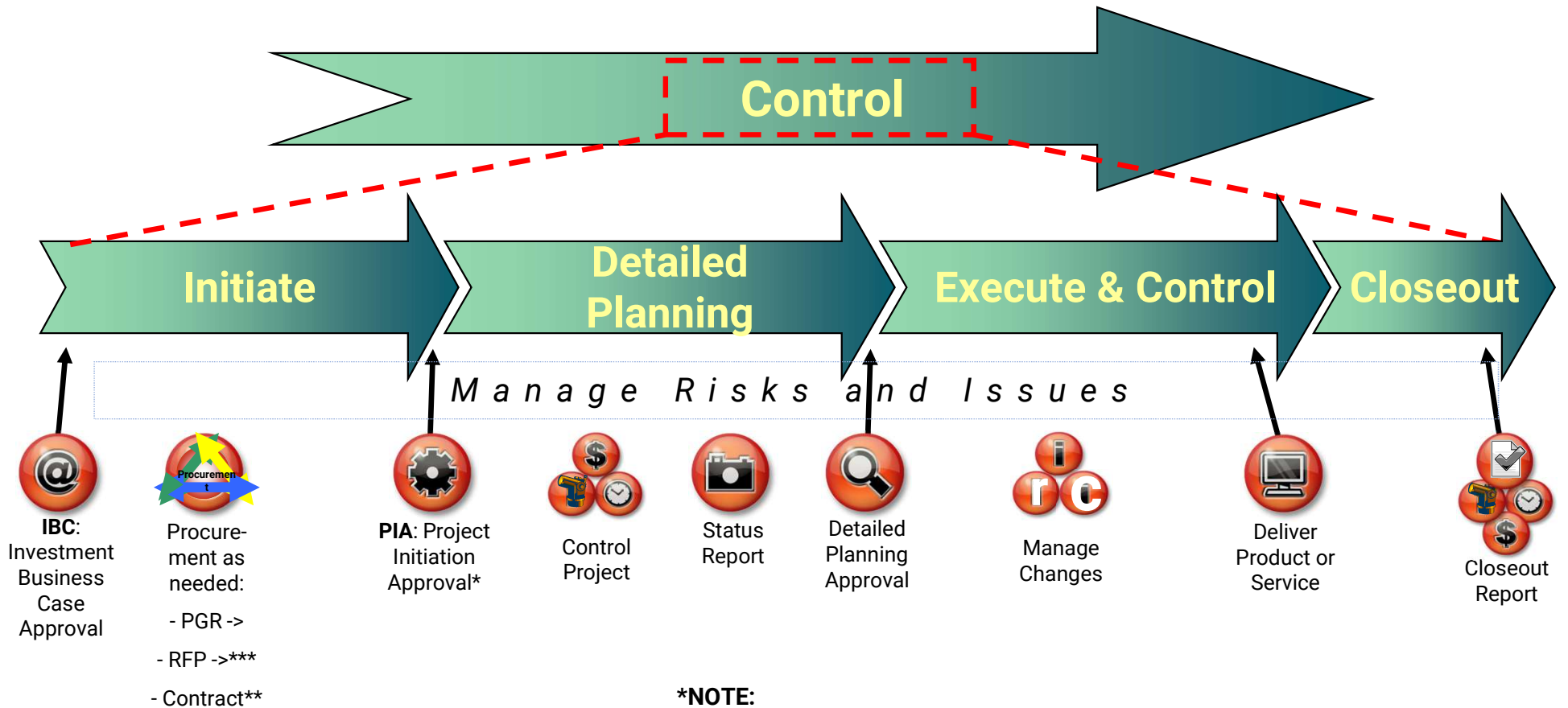
Project Management Standard (CPM112)

Project Manager Selection and Training Standard (CPM111)

Information Technology Investment Management Standard (CPM-516)

[Policies, Standards & Guidelines | Virginia IT Agency](#)

# COMMONWEALTH PROJECT MANAGEMENT (CPM) METHODOLOGY



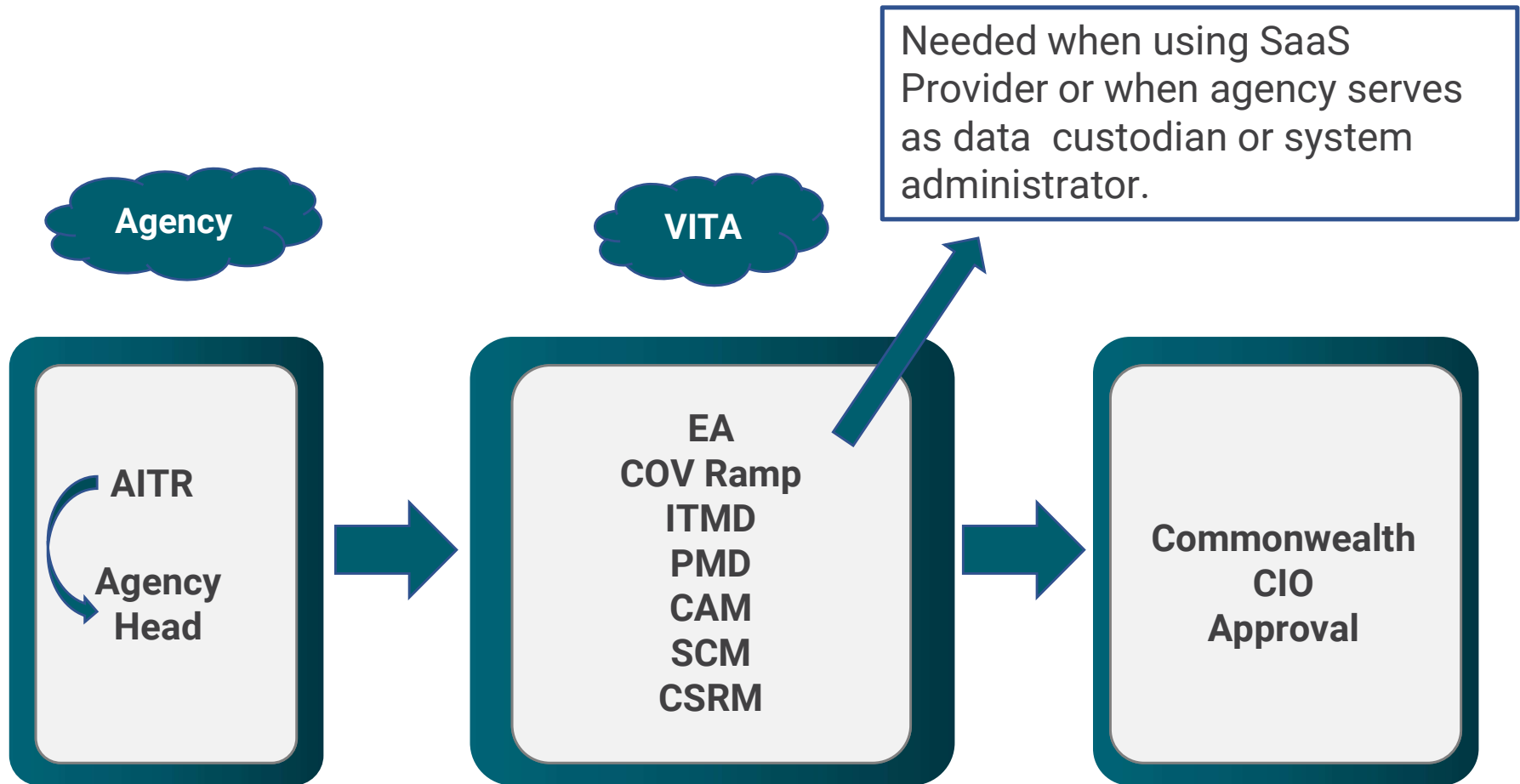
**\*NOTE:**

- Projects are designated “active” upon Project Initiation Approval.
- Contract/Statement of Work (SOW) may only be signed AFTER Project Initiation Approval.
- RFPs cannot be released until you have an approved PGR and IBC approval.

## PROCUREMENT GOVERNANCE REQUEST (PGR)

- VA Code 2.2-2012 states that the Commonwealth of Virginia (COV) CIO shall review, and approve or disapprove, all executive branch agency procurements of information technology, including approval of all agreements and contracts prior to the execution of the procurement
- A form in CTP that documents the proposed procurement method, estimated cost, and funding source of a project. A PGR is reviewed by ITIMD, then Supply Chain Management (SCM), Enterprise Architecture (EA), the Project Management Division (PMD), Security, and COV RAMP. A recommendation is then made to the COV CIO for approval or disapproval
- Project Manager does not have access to add or edit a PGR, only the AITR can perform these functions

## PGR APPROVAL



## PRE-INITIATION PLAN FOR PGRs

Steps in getting a finalized contract signed:

1. AITR submits PGR and VITA approves
2. Agency drafts request for proposal (RFP), sends to VITA to comment and approve
3. RFP sits on the street for 30-60 days
4. Agency receives responses to RFP and reviews
5. Evaluation team reviews RFP
6. Negotiations
7. COV RAMP
8. Cloud Terms
9. Contract draft goes to VITA for review and comments
10. For high-risk procurements, VITA and OAG review contract
11. Project gets PIA approval
12. Contract is signed

**10 Minute Break**



## WHAT IS A PROJECT

- A project is a temporary endeavor undertaken to deliver a unique product, service or result.
  - **Temporary**: a definite beginning and end
  - **Unique**: different in some distinguishing way from all other products or services provided by the organization
- An activity is a project if it leads to a new product or service or the modification of an existing product or service, resulting in a new unique capability
- Operations & Maintenance (O&M) activities, supporting an existing product or service are not projects so long as the focus of the activity is the continued use of the current product or service.

## PROJECT CATEGORIES

Commonwealth Level Project Categories 1-4				
		Complexity:		
		High	Med	Low
Risk:	High*	1	1	1
	Med	2	2	3
	Low	3	4	4
Limited Oversight and Agency Level Project:		n/a	n/a	n/a

## GROUP 1 AND 2

### Group 1

- Applies to all agencies by default
- Requires Full Oversight & Governance for projects \$250K and above

### Group 2

- Agencies may request evaluation for Group 2 status through their PMD Consultant
- All agencies are reviewed during Strategic Planning
- If approved:
  - Projects \$250K–\$999,999 receive Limited Oversight
  - Quarterly high-level status reporting required
  - Agencies are periodically reassessed by PMD
- If criteria are not met, agency returns to Group 1
- Agencies may request reevaluation if Group 2 status is lost

## LIMITED OVERSIGHT (GROUP 2 ONLY)

- All entries in CTP for limited oversight projects are done by the AITR and not the PM
- Only needs high level quarterly project status reporting

Required only for Group 2 projects between \$250K and \$1M in CTP

- Project Name
- Brief Description
- Budget
- Start and End Dates

## PROJECT INITIATION APPROVAL (PIA) REQUIREMENTS

### CBA (optional for cat 4)

An evaluation of the costs and benefits of alternative approaches to a proposed activity to determine the best alternative.

Not required for Category 4- but highly recommended

### Project Charter

A document issued by the project initiator or sponsor that formally authorizes the existence of a project, and provides the project manager with the authority to apply organizational resources to project activities



### BCAA & Summary

Determines the best solution for our problem, judges the different alternatives on an equal playing field, and demonstrates we are ensuring we select the best solution for the business problem.

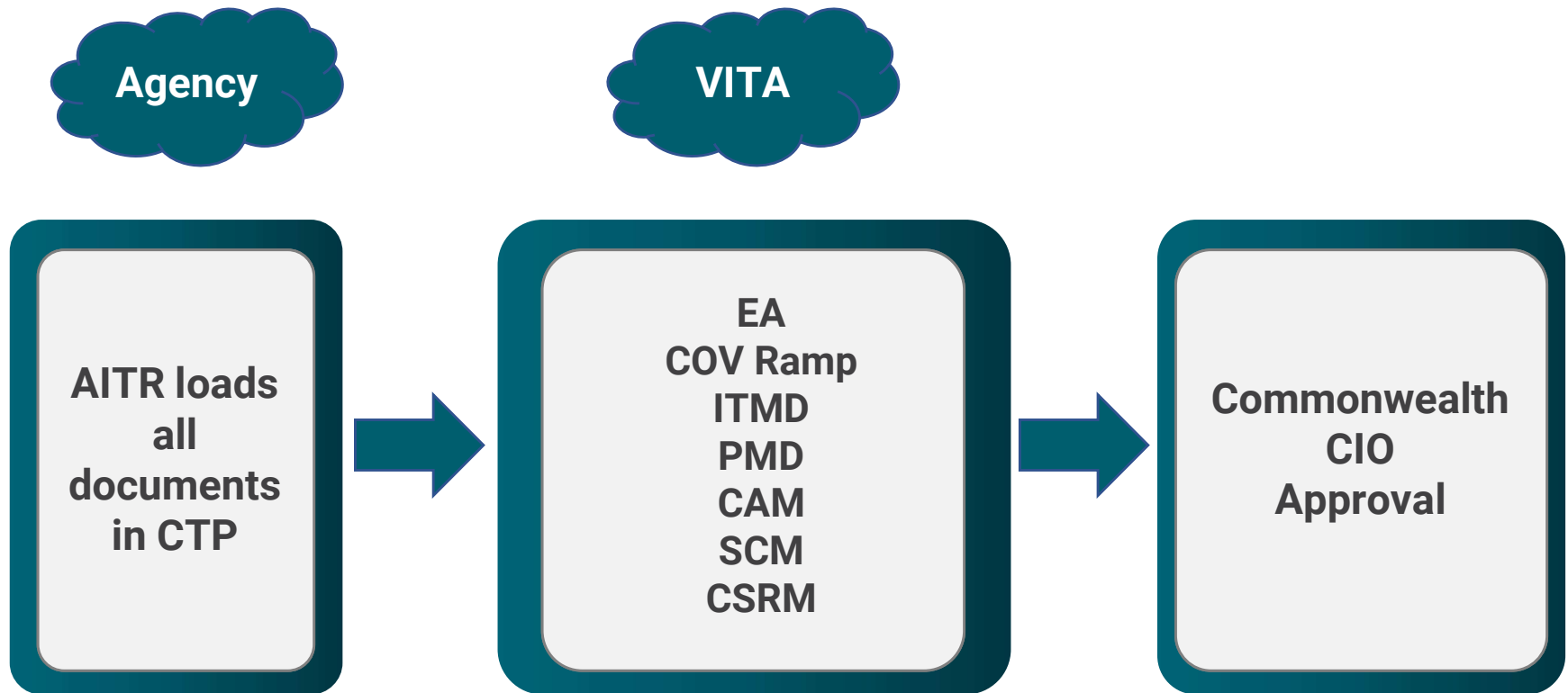
### Initiation Risk & Complexity

Primary driver of the level of Governance and Oversight needed for a project.

## PROJECT INITIATION APPROVAL (PIA)

- PIA is when the scope schedule and budget are locked down
- Approval Gates: PM → Sponsor → Agency Head → PMD → COV CIO
  - Secretariat Oversight Committee (SOC) approval required before CIO approval for CAT 1s and 2s
- After PIA approval, official measurement of the project starts in terms of scope, schedule, and budget
- Status reporting starts the first full month following the date of PIA approval
- IV&V planning starts at this stage
  - CAT 1 and 2 six months after approval of detailed project plan and annually thereafter if project is over 12 months in duration
  - IV&V is optional for CAT 3s and CAT 4s
- Contracts and SOWs cannot be signed until full PIA approval

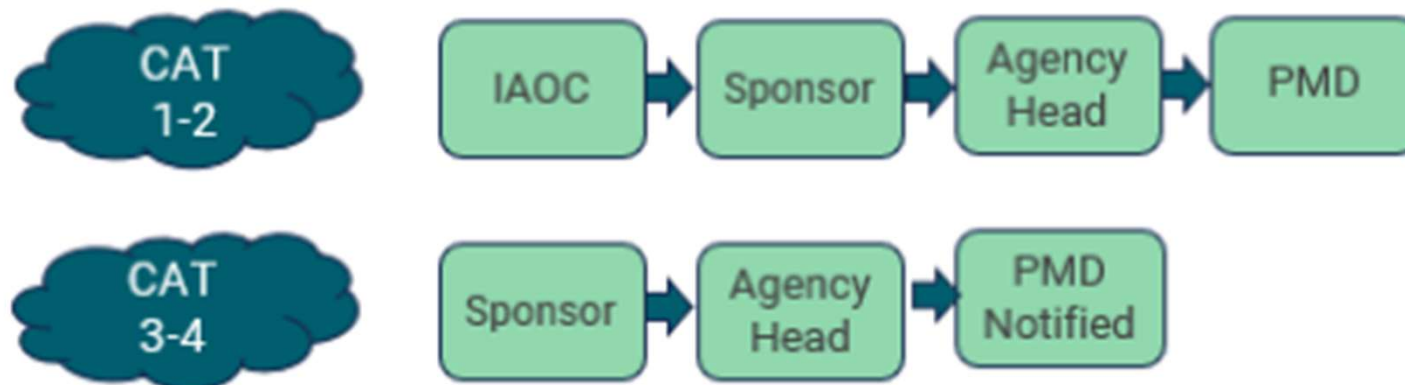
## CONTRACT AND SOW APPROVAL



## DETAILED PLANNING

After PIA is complete the PM will then start detailed planning which will need to be approved before execution can begin.

Approvals needed:



What's required for detailed planning depends on the category of the project. Once detailed planning is complete, the baseline may be adjusted.

## INITIATION: DIFFERENCES BY PROJECT CATEGORY

REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
Business Case & Alternatives Analysis	Required	Required	Required	Required
Cost / Benefit Analysis	Required	Required	Required	Not Required but highly recommended
Full-Time Project Manager	Shall, or by exception	Shall, or by exception	Shall, or by exception	Full-time not required
Project Initiation Risk / Complexity Assessment	Required	Required	Required	Required
Charter, with Project Team Organization Chart	Required	Required	Required	Required
Internal Agency Oversight Committee? (IAOC)	Required, with PMD	Required, with PMD	Required, with PMD	None; Agcy. PM Team only
(PMD): Balanced Scorecard	Required, delphi	Required, delphi	Not required	Not required
Project Initiation Approval Path:	Sponsor > Agency Head > SOC > PMD > CIO	Sponsor Agency Head > SOC > PMD > CIO	Sponsor > Agency Head > PMD > CIO	Sponsor > Agency Head

## DETAILED PLANNING: DIFFERENCES BY PROJECT CATEGORY

REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
Project Scope & Business Objective Worksheet	Required	Required	Required	Required
Work Breakdown Structure	Required	Required	Required	Optional
Organization Work Breakdown Structure	Required	Required	Optional	Optional
Resource Plan	Required	Required	Optional	Optional
Project Schedule (CTP: "Work & Assignments")	Required	Required	Required	Required
Risk Management Plan	Required	Required	Required	Required
Communication Plan	Required	Required	Optional	Optional

## DETAILED PLANNING: DIFFERENCES BY PROJECT CATEGORY (CONT.)

REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
Quality Management & IV&V Plan	Required	Required	Optional	Optional
Change & Configuration Management Plan	Required	Required	Optional	Optional
<i>Organization Change Management Plan</i>	Required	Required	Optional	Optional
Performance Plan	Required	Required	Optional	Optional
Budget Plan (CTP: "Financial Planning Detail")	Required	Required	Required	Required
Project Plan	Required	Required	Required	Required
Planning Risk / Complexity Assessment	Required	Required	Required	Required
<i>Detailed Planning Approval; baseline, approved by...</i>	Up to 15% IAOC > Sponsor > Agcy Head > PMD	Up to 20% IAOC > Sponsor > Agcy Head > PMD	Up to 25% IAOC > Sponsor > Agcy Head > PMD	Up to 35% IAOC > Sponsor > Agcy Head > PMD

## EXECUTE AND CONTROL: DIFFERENCES BY PROJECT CATEGORY

REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
IAOC Project Meetings	Monthly, w/PMD	Monthly, w/PMD	Quarterly, w/PMD	None; Agcy PM Team
In-Progress IV&V; to coincide with project phases	Req's within 6 mo. of planning approval and then annual if project > 12 mo. duration.	Required within 6 mo. of planning approval and then annual if project > 12 mo. duration.	Optional	None
Issue Log & Risk Log	Required	Required	Required	Optional
Status Report in CTP	Required; monthly	Required; monthly	Required; start, then quarterly	Required; start, then quarterly
"Nominal" Change Control Request	<15%, or 4 mo., if project is $\leq$ 24 mo. duration...approved by IAOC, Sponsor & Agency Head	<20%, or 4 mo., if project is $\leq$ 24 mo. duration...approved by IAOC, Sponsor & Agency Head	<25%, or 4 mo., if project is $\leq$ 24 mo. duration...approved by IAOC, Sponsor & Agency Head	<35%, or 4 mo., if project is $\leq$ 24 mo. Duration...approved by Project Sponsor
"Significant" Change Control Request	>15% approved by IAOC, Sponsor, Agency Head, SOC, CIO	>20% approved by IAOC, Sponsor, Agency Head, SOC, CIO	>25% approved by IAOC, Sponsor, Agency Head, CIO	>35%, approved by Sponsor & Agency Head
Event-Driven Risk/Complexity Assessment	Required after "Significant" Change Control Request	Required after "Significant" Change Control Request	Required after "Significant" Change Control Request	Required after "Significant" Change Control Request
O&M Funding Costs Estimate	Required	Required	Required	Required

## CLOSEOUT: DIFFERENCES BY PROJECT CATEGORY

REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
Project Closeout Report	Required	Required	Required	Required

## RISKS AND ISSUES

- Risk/Complexity assessment will be done at IBC, PIA and detailed planning phases but project risks need to be updated and monitored throughout the entire project lifecycle
- All project risks should be entered into CTP and updated regularly (at least monthly).
- For high-risk projects
  - Dedicated risk manager
  - Monthly risk meeting
  - Update risks/issues into CTP
  - Risk costs and project schedule impacts included in risk data.

## STATUS REPORTING

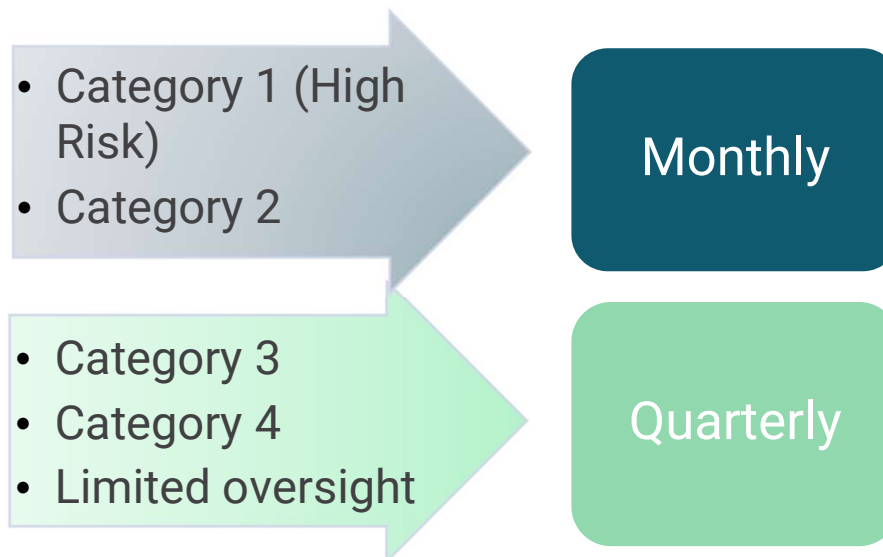
Status reporting will be done within CTP using the following screen:



COV Project Status Summary

There are 5 key status indicators that will be reported on:

- Business goals, budget, scheduled, scope, and risks



## STATUS REPORTING

Along with the COV Project Status Summary screen the other items will also have to be updated during status reporting:

- Actual financial data using the Financials tab and Actual Project Spend view
- Actual schedule data using the Plan tab and the Track Progress view

Your PMD consultant will let you know when you can start your status report, please wait for their approval before starting

## STATUS REPORTING

### Weekly status reporting for red/yellow projects

- For all Commonwealth level projects with yellow status or red status, or other projects identified by the COV CIO PMD is required to submit weekly updates. These updates will include:
  1. Communications of any factual indicators indicating that the project is not performing as anticipated for success (scope, schedule, budget)
  2. Actions required to address deficiencies
  3. Updates on the results of these actions and reassessment of status
  4. Updates on risks, issues and concerns, and mitigations thereof

# STATUS REPORTING EXAMPLE

## PROJECT: Network Hub Replacement

Current Status	Trending
Red	Yellow

Agency: VITA  
PM/O&G: Steve Smith/Chris Chappell

Budget: \$1M

Project Goals	Milestones	Dates	
		Planned	Actual
<p><b>Mission:</b> Deliver a network that is a one stop hub for customers and their families to coordinate and find resources as needed.</p>	Project Start	12/2023	
	Phase 1 Delivery	2/2024	
	Phase 1 go-live	4/2024	
	Phase 2 go-live	6/2024	
	UAT Testing	8/2024	
	Project End	11/2024	
Critical Points	Risks & Issues	Mitigation	
<p>The agency has a solution for the project management guidance. Virginia Veterans Network (VVN) and Veterans Information Management System (VIMS), a case management system, are projects that are running in parallel.</p> <ul style="list-style-type: none"> <li>Both projects will touch all the service lines in Virginia Department of Veterans Services (VDVS). There will be critical dependencies for integrations.</li> </ul>	<p>Resource Constraints: Both business and IT staff are going to be required to complete work on both initiatives. This could create conflict with availability.</p>	<p>Identifying lessons learned and setting up-front expectations clearly for Phase 2 to mitigate the confusion.</p>	

## CHANGE REQUESTS

Significant change requests are identified by using the percentages below. Anything under those percentages are considered nominal change requests. Multiple change requests can be submitted.

Category	Change %
1	15%
2	20%
3	25%
4	35%

Reminder:  
Nominal  
changes are  
cumulative

## CHANGE REQUESTS

Approval of change requests:

### Nominal

- CAT 1-3 Nominal: PM → IAOC → Sponsor → Agency Head → Report to PMD
- CAT 4 Nominal: PM → Sponsor → Report to PMD

### Significant

- CAT 1-2 Significant: PM → IAOC → Sponsor → Agency Head → PMD → SOC → CIO
- CAT 3 Significant: PM → IAOC → Sponsor → Agency Head → PMD → CIO
- CAT 4 Significant: PM → Sponsor → Agency Head → Report to PMD

## INDEPENDENT VERIFICATION AND VALIDATION (IV&V)

IV&V is a review of the project plans and other project artifacts by a disinterested third party to confirm the project is “doing the right thing” and doing it in the “right way”

- When an IV&V is required:
  - CAT 1-2: Within first 6 months after detailed planning approval and then annual if project is over 12 months in duration
  - CAT 3-4: Not required, but encouraged, if the project will benefit from an unbiased review
- Completing an IV&V when it’s required is a factor that’s looked at when evaluating your agency for Group 2 status

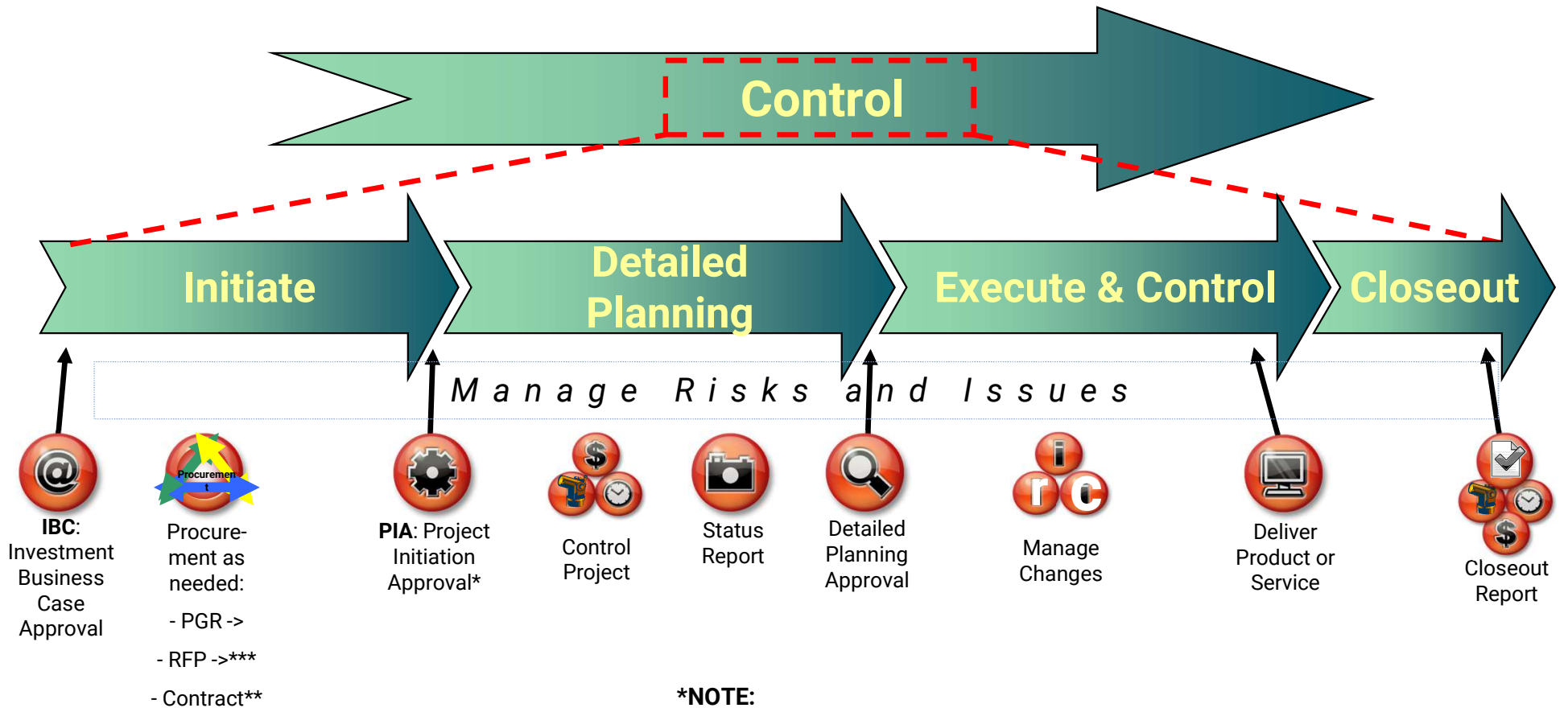
## PROJECT CLOSEOUT

Closeout is the last phase in the Commonwealth project lifecycle and focuses on the administrative closure and documentation of lessons learned or best practices and transition to O&M

### Steps for closeout:

1. PM completes closeout report in CTP
2. Lessons learned session is conducted and documented in CTP
3. PM obtains Sponsor and Agency Head approval
4. PMD consultant reviews closeout report and lessons learned, then recommends closeout
5. PMD director approves closeout on behalf of CIO

# COMMONWEALTH PROJECT MANAGEMENT (CPM) METHODOLOGY



**\*NOTE:**

- Projects are designated “active” upon Project Initiation Approval.
- Contract/Statement of Work (SOW) may only be signed AFTER Project Initiation Approval.
- RFPs cannot be released until you have an approved PGR and IBC approval.

## WEBSITES

### Project Management Development Program (PMDP)

- [Project Management Development Program](#)
- [Commonwealth Project Management Guideline \(CPM 110-05\) \(Word version\)](#)
- [Project Management Standard \(CPM112\)](#)
- [Project Manager Selection and Training Standard \(CPM 111\)](#)
- [PMD and ITIM Contacts](#)
- [COV IT Glossary](#)

# COMMONWEALTH IT PROJECT MANAGER ORIENTATION

## Wrap Up



# QUESTIONS

