**PROJECT MANAGER ASSESSMENT**

1. **SCOPE**

North Carolina General Statute143B-1340 and North Carolina General Statute143B-1341 require the State Chief Information Officer (SCIO) to establish project management criteria and standards, as well as to review and approve the assignment of Project Managers (PMs) to Information Technology (IT) Projects. By approving this Quality Work Instruction (QWI), the SCIO delegates the implementation of this authority to the Enterprise Project Management Office (EPMO) Director. This QWI defines the procedure for effectively reviewing the qualifications of the assigned PM, and authorizing the PM to manage the proposed project. The Project Manager Assessment is completed as part of the [0300-0310-005-C PROJECT INITIATION](https://it.nc.gov/media/1003/open) procedure within the [0300-0300-005-B PROJECT MANAGEMENT PROCESS](https://it.nc.gov/media/1002/open).

1. **OWNER**
   1. The SCIO owns this QWI and delegates responsibility for its implementation to the EPMO Director. No changes, additions or alterations may be made without the owner’s written approval.
2. **REFERENCE DOCUMENTS**

|  |  |
| --- | --- |
| **DOCUMENT IDENTIFICATION** | **DOCUMENT TITLE** |
| NC General Statute143B-1340 | PROJECT MANAGEMENT |
| NC General Statute143B-1341 | PROJECT MANAGEMENT STANDARDS |
| 0100-0800-010-B | **FORMS AND RECORDS CONTROL** |
| 0300-0300-005-B | [PROJECT MANAGEMENT PROCESS](https://it.nc.gov/media/1002/open) |
| 0600-0600-005-B | **CORRECTIVE ACTION PROCESS** |
| 0300-0310-005-C | [PROJECT INITIATION](https://it.nc.gov/media/1003/open) |

1. **ASSOCIATED FORMS**

|  |  |
| --- | --- |
| **FORMS IDENTIFICATION** | **FORM TITLE** |
| 0300-0310-005-D | [PROJECT CHARTER FORM](https://it.nc.gov/media/1005/open) |
| 0300-0310-025-D | [PROJECT MANAGER ASSESSMENT FORM](https://it.nc.gov/media/1009/open) |
| 0600-0600-005-D | **CORRECTIVE ACTION FORM** |

1. **DEFINITIONS**

* NONE

1. **PROCEDURE**

The Project Management Advisor (PMA), with the assistance of the PM and in coordination with the Business Owner, will complete the [0300-0310-025-D PROJECT MANAGER ASSESSMENT FORM](https://it.nc.gov/media/1009/open) as described below.

* 1. The PMA reviews the project’s scope and optimal PM knowledge, skills and experience required with the Business Owner and PM. The PMA will schedule meetings as required to review the PM’s training and experience relative to the project.
  2. **Project Information** (Section 1.0) - The PMA enters the required information as drawn from the [0300-0310-010-D PROJECT CHARTER FORM](https://it.nc.gov/media/1005/open) and enters the date of the assessment.
  3. **Project Manager (PM) Assessment** (Section 2.0)
     1. The PMA documents the optimal knowledge, skills and experience required by the project. (Section 2.1)
     2. The PMA reviews the PM’s knowledge, skills and experience information, and reviews it with the PM relative to the project’s requirements. (Section 2.2)
     3. The PMA documents the results of their review. (Section 2.3)
     4. The PMA provides a determination as to whether the PM meets the qualification requirements for the project. (Section 2.4)
        1. If the PMA determines that the PM’s qualifications place the project at risk or does not meet the Quality Assurance standards set by the EPMO, the PMA will notify the Business Owner and select “No” in Section 2.4. The PMA will then submit a DRAFT **0600-0600-005-D CORRECTIVE ACTION FORM** to the EPMO Director.
        2. The EPMO Director will complete the **0600-0600-010-D CORRECTIVE ACTION FORM** in accordance with **0600-0600-005-B CORRECTIVE ACTION PROCESS**.
     5. The PMA provides any additional comments. (Section 2.5)
  4. The PMA will post the completed [0300-0310-025-D PROJECT MANAGER ASSESSMENT FORM](https://it.nc.gov/media/1009/open) to the EPMO Project Management Record Center.

1. **RECORDS**
   1. Unless otherwise specified in this Procedure/QWI, Records shall be maintained in accordance with **0100-0800-010-B FORMS AND RECORDS CONTROL** procedure.
2. **REASON FOR CHANGE**
   1. Updated general statutes.
   2. Changed EPMO Manager to EPMO Director.