

**Texas State University-San Marcos**  
**Information Technology**  
**Project Classification Criteria / Check List**

Project Name: "xyz"					Project Name: "xyz"								
Project Type	Technology Resources' Classification Characteristic	Technology Resources' Application Classification Characteristic Criteria Risk & Complexity Items	Yes	No	Technology Resources' Required Documents	Project Type	Alkek Library's Classification Characteristic	Alkek Library's Application Classification Characteristic Criteria Risk & Complexity Items	Yes	No	Alkek Library's Required Documents		
Project Ultra-Lite	Project Team	1 to 3 IT people or groups			Charter Business Requirements (Level 1) Hi-Level Estimates (Level 1) Communication Plan (Level 1) Business Requirements (Level 2) Communication Plan (Level 2) Work Plan/Schedule Close-Out Report	Project Ultra-Lite	Project Team	Up to 2 IT people/groups			Charge/Charter Includes: Business, Technical Requirements Funding Estimates Communication Plan Work Plan Close-Out Report		
		0 to 2 Business area representatives							Up to 3 Business Units/People				
	Scope & Process Impact												
	Department Impact	Minor/Minimal change to existing system or process							Department Impact	Minor/Minimal change to existing system of process			
	University-wide Impact	Minor/Minimal University-wide impact							University-wide Impact	Minor/minimal University-wide impact			
	Multiple-University Impact	No Multiple-University impact							Multiple-University Impact	No Multiple-University Impact			
	Supplier or Consultant Involvement	External resources either unnecessary or supplied at no cost (No RFP required)							Supplier or Consultant Involvement	External staff resources are either unnecessary or supplied at no cost (no RFP required)			
	Technology	Experienced with all components of Known Technology							Technology	Project Team has experienced with nearly all of the key required technologies			
	Complexity	Minor/Minimal changes to existing systems 'or' modules, with minimal or no interfaces; High comfort level to complete							Complexity	Minor/Minimal changes to existing systems with few or no changes to processes and workflow; High comfort level to complete			
	Work Effort	Less than 120 hours (3 wk)							Work Effort	Less than 200 person hours			
Time to Deliver (Duration)	Less than 6 Weeks to operation					Time to Deliver (Duration)	Up to 5 calendar months						
Project Lite	Project Team	3 to 5 IT people or groups			Charter Business Requirements (Level 1) Hi-Level Estimates (Level 1) Communication Plan (Level 1) Activity Diagram Business Requirements (Level 2) Communication Plan (Level 2) Work Breakdown Structure (WBS) Work Plan/Schedule Cost Estimates & Base Line, if applicable Testing Plan Training Plan Close-Out Report	Project Lite	Project Team	2 to 5 IT people/groups			Charge/Charter Includes: Business, Technical Requirements Funding, Cost Estimates Communication Plan Work Plan Includes: Activity Diagram Work Breakdown Structure, as needed Testing Plan Training Plan Close-Out Report		
		3 to 5 Business area representatives							Up to 5 Business Units/People				
	Scope & Process Impact												
	Department Impact	Moderate change to existing system or process affecting or involving 1-3 departments							Department Impact	Moderate change to existing system or process			
	University-wide Impact	Moderate to no University-wide impact, possibly affecting or involving 1 - 3 divisions							University-wide Impact	Moderate to no University-wide impact			
	Multiple-University Impact	Possible Multiple-University impact							Multiple-University Impact	Possible Multiple-University impact			
	Supplier or Consultant Involvement	External resources either unnecessary or obtained through existing support contracts, may require internal oversight of cost expenditures (No RFP required)							Supplier or Consultant Involvement	External resources either unnecessary or obtained through existing support contracts, may require internal oversight of cost expenditures (No RFP required)			
	Technology	Experienced with most components of Known Technology							Technology	Project Team lacks experience with one or more key required technologies			
	Complexity	Moderate changes to existing systems with possible moderate interfaces 'or' development or implementation of new modules with moderate or no interfaces; Moderate to High comfort level to complete							Complexity	Major/significant changes to existing systems including probable changes to processes or workflow. Lower comfort level to complete			
	Work Effort	Greater than 120 hours, but less than 400 hours (10 wk)							Work Effort	Between 200 and 1000 person hours			
Time to Deliver (Duration)	Greater than 6 Weeks, but less than 4.5 Months (18 wk)					Time to Deliver (Duration)	5 to 12 calendar months						
Project Full	Project Team	Greater than 5 IT people or groups			Charter Business Requirements (Level 1) Hi-Level Estimates (Level 1) Communication Plan (Level 1) Activity Diagram Business Requirements (Level 2) Communication Plan (Level 2) Work Breakdown Structure (WBS) Work Plan/Schedule Cost Estimates & Base Line, if applicable RFI, RFO, if applicable Vendor Statement of Work/Contract Testing Plan Training Plan Risk Assessment/Planning Change Management Plan Close-Out Report	Project Full	Project Team	Up to 5 or more IT people/groups			Charge/Charter Includes: Business, Technical Requirements Funding, Cost Estimates Communication Plan Work Plan Includes: Activity Diagram Work Breakdown Structure, as needed Testing Plan Training Plan Risk Assessment/Planning Change Management Plan RFI, RFO, if applicable Vendor Statement of Work/Contract, if applicable Close-Out Report		
		Greater than 5 Business area representatives							Up to 8 or more Business Units/People				
	Scope & Process Impact												
	Department Impact	Major/significant change to existing system, with moderate to significant changes to work processes for multiple University departments or divisions							Department Impact	Major/significant change to existing system, with moderate to significant changes to work processes for multiple University departments or divisions			
	University-wide Impact	Moderate to extensive University-wide impact							University-wide Impact	Moderate to extensive University-wide impact			
	Multiple-University Impact	Possible Multiple-University impact							Multiple-University Impact	Possible Multiple-University impact			
	Supplier or Consultant Involvement	May require external resources which requires funding, and internal oversight of cost expenditures							Supplier or Consultant Involvement	May require external resources which requires funding, and internal oversight of cost expenditures. (RFP may be required)			
	Technology	Lack of experience with New Technology 'or' experienced with some components of Known Technology							Technology	Project Team lacks experience with one or more key required technologies			
	Complexity	Major/significant changes to existing systems with moderate to significant interfaces 'or' development or implementation of new modules with moderate to significant interfaces 'or' implementation of new software/technology packages/systems with or without interfaces; Low to Moderate comfort level to complete							Complexity	Major/significant changes to existing systems including probable changes to processes or workflow. Lower comfort level to complete			
	Work Effort	Greater than 400 hours (10 wk)							Work Effort	Greater than 1000 person hours			
Time to Deliver (Duration)	Greater than 4.5 Months (18 wk)					Time to Deliver (Duration)	8 or more calendar months						
State of Texas Project Delivery Framework and Quality Assurance Team - Policy and Procedures Manual	If Project Cost = \$1,000,000 or more, and Project Duration = Greater than 1 year <a href="http://www.dir.state.tx.us/pubs/framework">http://www.dir.state.tx.us/pubs/framework</a> <a href="http://qat.state.tx.us/manual.htm">http://qat.state.tx.us/manual.htm</a>				Texas Project Delivery Framework Documentation	State of Texas Project Delivery Framework and Quality Assurance Team - Policy and Procedures Manual	If Project Cost = \$1,000,000 or more, and Project Duration = Greater than 1 year <a href="http://www.dir.state.tx.us/pubs/framework">http://www.dir.state.tx.us/pubs/framework</a> <a href="http://qat.state.tx.us/manual.htm">http://qat.state.tx.us/manual.htm</a>			If Yes, Complete "DIR" documentation requirements	Texas Project Delivery Framework Documentation		

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Information Technology  
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Project Name: "xyz"					Project Name: "xyz"						
Project Type	ITS-Academic Computing's Classification Characteristic	ITS-Academic Computing's Application Classification Characteristic Criteria Risk & Complexity Items	Yes	No	ITS-Academic Computing's Required Documents	Project Type	ITS-Classroom Technology's Classification Characteristic	ITS-Classroom Technology's Application Classification Characteristic Criteria Risk & Complexity Items	Yes	No	ITS-Classroom Technology's Required Documents
Project Ultra-Lite	Project Team	1 to 2 IT people or groups			Charter Business Requirements (Level 1) Hi-Level Estimates (Level 1) Communication Plan (Level 1) Business Requirements (Level 2) Communication Plan (Level 2) Work Plan/Schedule Close-Out Report	Project Ultra-Lite	Project Team	1 or 2 Media technicians			Project Documents Including: Room Diagram for Requirements & Communications Detailed Cost Estimates Work Plan/Schedule/Milestones Signal Testing Plan Training Plan Implementation Assessment
	Scope & Process Impact	0 to 2 Business area representatives					Scope & Process Impact				
	Department Impact	Minor/Minimal change to existing system or process					Department Impact	Communication with Immediate Users			
	University-wide Impact	Minor/Minimal University-wide impact					University-wide Impact	No University-wide Impact			
	Multiple-University Impact	Trivial Multiple-University impact (1 to 2 persons, retraining only)					Multiple-University Impact	No Multiple-University Impact			
	Supplier or Consultant Involvement	External resources either unnecessary or supplied at no cost (No RFP required)					Supplier or Consultant Involvement	None			
	Technology	Experienced with all components of Known Technology					Technology	Existing technology or similar appliance upgrade			
	Complexity	Minor/Minimal changes to existing systems 'or' modules, with minimal or no interfaces; High comfort level to complete					Complexity	Conventional signal flow, no custom configuration			
	Work Effort	Less than 120 hours (3 wk)					Work Effort	1 week or less			
	Time to Deliver (Duration)	Less than 6 Weeks to operation					Time to Deliver (Duration)	Less than 1 Month to deliver			
Project Lite	Project Team	3 to 5 IT people or groups			Charter Business Requirements (Level 1) Hi-Level Estimates (Level 1) Communication Plan (Level 1) Activity Diagram Business Requirements (Level 2) Communication Plan (Level 2) Work Breakdown Structure (WBS) Work Plan/Schedule Cost Estimates & Base Line, if applicable Testing Plan Training Plan Close-Out Report	Project Lite	Project Team	2 to 5 IT people/groups			Project Documents Including: Room Diagram for Requirements & Communications Detailed Cost Estimates Testing Plan Training Plan Work Plan/Schedule/Milestones Implementation Assessment
	Scope & Process Impact	3 to 5 Business area representatives					Scope & Process Impact				
	Department Impact	Moderate change to existing system or process affecting or involving 1-3 departments					Department Impact	Minor - Creating or modifying a known type of resource (equipping a classroom with equipment). Requires notification of faculty and department, possible training required			
	University-wide Impact	Moderate to no University-wide impact, possibly affecting or involving 1 - 3 divisions					University-wide Impact	No University-wide Impact			
	Multiple-University Impact	Possible Multiple-University impact					Multiple-University Impact	No Multiple-University Impact			
	Supplier or Consultant Involvement	External resources either unnecessary or obtained through existing support contracts, may require internal oversight of cost expenditures (No RFP required)					Supplier or Consultant Involvement	Able to complete project without external resources except standard A/V equipment vendors			
	Technology	Experienced with most components of Known Technology					Technology	Existing or similar or new Technology			
	Complexity	Moderate changes to existing systems with possible moderate interfaces 'or' development or implementation of new modules with moderate or no interfaces; Moderate to High comfort level to complete					Complexity	Existing or emerging known technologies, some customization of set-up. New or renovated installs in existing buildings			
	Work Effort	Greater than 120 hours, but less than 400 hours (10 wk)					Work Effort	1 to 2 weeks			
	Time to Deliver (Duration)	Greater than 6 Weeks, but less than 4.5 Months (18 wk)					Time to Deliver (Duration)	No more than two months			
Project Full	Project Team	Greater than 5 IT people or groups			Charter Business Requirements (Level 1) Hi-Level Estimates (Level 1) Communication Plan (Level 1) Activity Diagram Business Requirements (Level 2) Communication Plan (Level 2) Work Breakdown Structure (WBS) Work Plan/Schedule Cost Estimates & Base Line, if applicable RFI, RFO, if applicable Vendor Statement of Work/Contract Testing Plan Training Plan Risk Assessment/Planning Change Management Plan Close-Out Report	Project Full	Project Team	5 Media Technicians + additional hired labor			Project Documents Including: Room Diagram for Requirements & Communications Detailed Cost Estimates Work Plan/Schedule/Milestones RFI, RFO, if applicable Vendor Statement of Work/Contract Testing Plan Training Plan Risk Assessment/Planning, as needed Change Management Plan, as needed Implementation Assessment
	Scope & Process Impact	Greater than 5 Business area representatives					Scope & Process Impact				
	Department Impact	Major/significant change to existing system, with moderate to significant changes to work processes for multiple University departments or divisions					Department Impact	Major - impacting the base resource of identified department			
	University-wide Impact	Moderate to extensive University-wide impact					University-wide Impact	Yes - may provide additional classroom resources for other departments			
	Multiple-University Impact	Possible Multiple-University impact					Multiple-University Impact	None			
	Supplier or Consultant Involvement	May require external resources which requires funding, and internal oversight of cost expenditures					Supplier or Consultant Involvement	Requires external resources			
	Technology	Lack of experience with New Technology 'or' experienced with some components of Known Technology					Technology	Existing Technology "or" New Technology			
	Complexity	Major/significant changes to existing systems with moderate to significant interfaces 'or' development or implementation of new modules with moderate to significant interfaces 'or' implementation of new software/technology packages/systems with or without interfaces; Low to Moderate comfort level to complete					Complexity	Existing or emerging known technologies, customization of set-up, can be complex in nature with multiple non-conventional requirements. New Building Construction			
	Work Effort	Greater than 400 hours (10 wk)					Work Effort	1 to 2 months (not more than 2500 hours)			
	Time to Deliver (Duration)	Greater than 4.5 Months (18 wk)					Time to Deliver (Duration)	6 months to 2 years to deliver			
State of Texas Project Delivery Framework and Quality Assurance Team - Policy and Procedures Manual	If Project Cost = \$1,000,000 or more, and Project Duration = Greater than 1 year <a href="http://www.dir.state.tx.us/pubs/framework">http://www.dir.state.tx.us/pubs/framework</a> <a href="http://qat.state.tx.us/manual.htm">http://qat.state.tx.us/manual.htm</a>			If Yes, Complete "DIR" documentation requirements	Texas Project Delivery Framework Documentation	State of Texas Project Delivery Framework and Quality Assurance Team - Policy and Procedures Manual	If Project Cost = \$1,000,000 or more, and Project Duration = Greater than 1 year <a href="http://www.dir.state.tx.us/pubs/framework">http://www.dir.state.tx.us/pubs/framework</a> <a href="http://qat.state.tx.us/manual.htm">http://qat.state.tx.us/manual.htm</a>			If Yes, Complete "DIR" documentation requirements	Texas Project Delivery Framework Documentation

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Project Name: "xyz"					Project Name: "xyz"					Project Name: "xyz"													
Project Type	ITS - Instructional Design's Classification Characteristic	ITS - Instructional Design's Classification Characteristic Criteria Risk & Complexity Items	Yes	No	ITS - Instructional Design's Required Documents	Project Type	ITS - Educational Technology Center's Classification Characteristic	ITS - Educational Technology Center's Application Classification Characteristic Criteria Risk & Complexity Items	Yes	No	ITS - Educational Technology Center's Required Documents	Project Type	Security's Classification Characteristic	Security's Application Classification Characteristic Criteria Risk & Complexity Items	Yes	No	Security's Required Documents						
Project Ultra-Lite	Project Team	1 to 3 IT people or groups			Proposal (as needed) Charter Including: Business Requirements Hi-Level Estimates Design Overview (as needed) Strategies Matrices (as needed) Communication Plan ID Development Schedule Status Reports Close-Out Report Evaluation Report, if instructional	Project Ultra-Lite (Agile Project)	Project Team	Core group 1 to 6			Project Skinny (with Requirements / Deliverables) Project Roundtable Communication Plan Project One-page Project Critique	Project Ultra-Lite	Project Team	1 or 2 IT people/groups			Charter Business Requirements Hi-Level Estimates Communication Plan Work Plan/Schedule Close-Out Report						
		0 to 2 Business area representatives						Primarily a single client; possibility others if there is a single person designated for approval gates during project work												Project is of this type if answer to 6 or more criteria is "Yes". Otherwise, go to next Type.			
	Scope & Process Impact							Scope & Process Impact															
	Department Impact	Minor/Minimal change to existing system or process						Department Impact	Minor/Minimal change to existing system or process unless project requires rapid deployment of a new technology to meet an immediate need rather a focus on reliability														
	University-wide Impact	Minor/Minimal University-wide impact						University-wide Impact	Minor University-wide impact														
	Multiple-University Impact	No Multiple-University impact						Multiple-University Impact	No multiple-University impact unless technology is of very low risk														
	Supplier or Consultant Involvement	External resources either unnecessary or supplied at no cost (No RFP required)						Supplier or Consultant Involvement	No external resources required except with the possible of an short-term external contractor														
	Technology	Experienced with all components of Known Technology						Technology	NA														
	Complexity	Minor/Minimal changes to existing systems 'or' modules, with minimal or no interfaces; High comfort level to complete						Complexity	Requires progressive development or done in iterations, with reoccurring planning and requirements phases														
	Work Effort	Less than 120 hours (3 wk)						Work Effort	Estimated work effort does not require resource drain from other projects unless the project is given a major priority by VPIT office														
	Time to Deliver (Duration)	Up to a semester to deliver					Time to Deliver (Duration)	Less than 1 Semester															
Project Lite	Project Team	3 to 5 IT people or groups			Proposal (as needed) Charter Including: Business Requirements Hi-Level Estimates Design Overview (as needed) Strategies Matrices (as needed) Communication Plan ID Development Schedule Status Reports QA Testing Checklist Instructor Notes as Training Plan (as needed) Close-Out Report Evaluation Report, if instructional	Project Lite	Project Team	Within 1 service area (e.g. creative design or video production)			Project Request (with Requirements / Deliverables) Project Profile Work Plan Communication Plan Project Critique As needed, Tech specs Contract Change order Approval record Beta-test Status report	Project Lite	Project Team	2 to 5 IT people/groups			Charter Business Requirements Hi-Level Estimates Communication Plan Work Breakdown Structure (WBS) Work Plan/Schedule Cost Estimates & Base Line, if applicable Testing Plan Training Plan Close-Out Report						
		3 to 5 Business area representatives						Scope & Process Impact													Project is of this type if answer to 6 or more criteria is "Yes". Otherwise, go to next Type.		
	Department Impact	Moderate change to existing system or process affecting or involving 1-3 departments						Department Impact	Initiated by a person or a department														
	University-wide Impact	Moderate to no University-wide impact, possibly affecting or involving 1 - 3 divisions						University-wide Impact	No university-wide impact beyond client														
	Multiple-University Impact	Possible Multiple-University impact						Multiple-University Impact	No multiple-university impact														
	Supplier or Consultant Involvement	External resources either unnecessary or obtained through existing support contracts, may require internal oversight of cost expenditures (No RFP required)						Supplier or Consultant Involvement	No external resources required except for contracted services related to the production and distribution of media product such as duplication or external production personnel														
	Technology	May or may not be experienced with components of key technology, as it may involve be a prototype project or proof of concept						Technology	Use of existing video or graphic design infrastructure														
	Complexity	Moderate changes to existing systems with possible moderate interfaces 'or' development or implementation of new modules with moderate or no interfaces; Moderate to High comfort level to complete						Complexity	Media production or creative design within current range of services														
	Work Effort	Greater than 120 hours, but less than 400 hours (10 wk)						Work Effort	Up to one academic year to complete work														
	Time to Deliver (Duration)	Up to an academic year to deliver						Time to Deliver (Duration)	Up to one academic year to complete work														
Project Full	Project Team	Greater than 5 IT people or groups			Proposal (as needed) Charter Including: Business Requirements Hi-Level Estimates Design Overview (as needed) Strategies Matrices (as needed) Communication Plan ID Development Schedule Status Reports Including: Risk Assessment/Planning Vendor Statement of Work (as needed) QA Testing Checklist Instructor Notes as Training Plan (as needed) Close-Out Report Evaluation Report, if instructional	Project Full	Project Team	Greater than 5 IT people or groups			Project Charter (with Requirements / Deliverables) Formal Project Plan Work Plan Activity Diagram Work Breakdown Structure Risk Assessment Communication Plan Lessons Learned Survey	Project Full	Project Team	5 or more IT people/groups			Charter Business Requirements Hi-Level Estimates Communication Plan Activity Diagram Work Breakdown Structure (WBS) Work Plan/Schedule Cost Estimates & Base Line, if applicable RFI, RFO, if applicable Vendor Statement of Work/Contract Testing Plan Training Plan Risk Assessment/Planning Change Management Plan Close-Out Report						
		Greater than 5 Business area representatives						Scope & Process Impact													Project is of this type if it cannot be classified as either Ultra-Lite or Lite per the above criteria.		
	Department Impact	Major/significant change to existing system, with moderate to significant changes to work processes for multiple University departments or divisions						Department Impact	Major/significant change to existing system, with moderate to significant changes to work processes for multiple University departments or divisions														
	University-wide Impact	Moderate to extensive University-wide impact						University-wide Impact	Moderate to extensive University-wide impact														
	Multiple-University Impact	Possible Multiple-University impact						Multiple-University Impact	Possible Multiple-University impact														
	Supplier or Consultant Involvement	May require external resources which requires funding, and internal oversight of cost expenditures						Supplier or Consultant Involvement	May require external resources which requires funding, and internal oversight of cost expenditures														
	Technology	Lack of experience with New Technology 'or' experienced with some components of Known Technology						Technology	Lack of experience with New Technology 'or' experienced with some components of Known Technology														
	Complexity	Major/significant changes to existing systems with moderate to significant interfaces 'or' development or implementation of new modules with moderate to significant interfaces 'or' implementation of new software/technology packages/systems with or without interfaces; Low to Moderate comfort level to complete						Complexity	Major/significant changes to existing systems with moderate to significant interfaces 'or' development or implementation of new modules with moderate to significant interfaces 'or' implementation of new software/technology packages/systems with or without interfaces; Low to Moderate comfort level to complete														
	Work Effort	Greater than 400 hours (10 wk)						Work Effort	Greater than 400 hours (10 wk)														
	Time to Deliver (Duration)	6 months to 2 years to deliver						Time to Deliver (Duration)	Greater than an academic year														
State of Texas Project Delivery Framework and Quality Assurance Team - Policy and Procedures Manual	If Project Cost = \$1,000,000 or more, and Project Duration = Greater than 1 year <a href="http://www.dir.state.tx.us/pubs/framework">http://www.dir.state.tx.us/pubs/framework</a>				Texas Project Delivery Framework Documentation	State of Texas Project Delivery Framework and Quality Assurance Team - Policy and Procedures Manual	If Project Cost = \$1,000,000 or more, and Project Duration = Greater than 1 year <a href="http://www.dir.state.tx.us/pubs/framework">http://www.dir.state.tx.us/pubs/framework</a>				Texas Project Delivery Framework Documentation	State of Texas Project Delivery Framework and Quality Assurance Team - Policy and Procedures Manual	If Project Cost = \$1,000,000 or more, and Project Duration = Greater than 1 year <a href="http://www.dir.state.tx.us/pubs/framework">http://www.dir.state.tx.us/pubs/framework</a>				If Yes, Complete "DIR" documentation requirements	Texas Project Delivery Framework Documentation					
		<a href="http://qat.state.tx.us/manual.htm">http://qat.state.tx.us/manual.htm</a>						<a href="http://qat.state.tx.us/manual.htm">http://qat.state.tx.us/manual.htm</a>						<a href="http://qat.state.tx.us/manual.htm">http://qat.state.tx.us/manual.htm</a>									