THE UNIVERSITY OF THE SOUTH PACIFIC

PROJECT SIZING PROCEDURES

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1. Background

The University is committed to the adoption of a standard approach to project management that reflects the Mission and Values of the University and the consistent use of project management procedures and templates to facilitate the implementation of strategic priorities.

2. Purpose

This procedure helps to identify the resourcing levels as well as the extent to which key documents of the project management methodology should be prepared, including the level of detail in those key documents.   Not all projects require high and complex levels of governance, documentation and reporting, however those that do, must be identifiable and resourced accordingly.

3. Scope

a) This policy applies to all types of projects in the University, including but not limited to capital projects, IT system projects, re-engineering and automation projects, research projects, development assistance projects and any other activity the University deems will be best delivered using these procedures. It covers projects funded by the University, member countries, financial institutions or other development partners and/or join ventures.

b) Projects must operate within all related financial regulations, policies and procedures of the University, including project requirements from any development partners or financial institutions.

4. When would you determine the Project Size?

When a Project Sponsor prepares a project proposal (Refer Project Specific Key Reference Documentation under No.4 above), the sponsor can make an initial determination of the project size and proposed project resourcing. Once the project proposal has been approved by the relevant oversight Committee (Refer Project Management Framework – Research Committees for Research Projects and Space Committee for Capital Works), the proposal will be forwarded to the Project Management Team (Refer Project Management Framework) where the size of the project should be formally determined, approved and the appropriate resourcing provided (including Project Management staffing).

5. Who should determine the Project Size?

The first task of the Project Management Team is to determine the size of the project in consultation with the Project Sponsor, establish a Project Steering Committee and appoint a chair where necessary (Refer Project relevant key reference documentation under point No. 4 above) .

6. How to determine the size of the Project?

There are several factors used in these procedures to be considered when sizing a project, and each of them must be considered thoroughly for their impact on the project.   It should be noted that projects may not always fit into the categories outlined in these procedures and therefore Project Sponsors and Project Managers may need to tailor their recommendations depending on the circumstances of the particular case.   In all cases, resourcing decisions and approvals must be well documented.

7. Project Sizing Steps

Step 1: Using the table for **Project Sizing Criteria (Appendix A)** below, tick the relevant categories as they apply to the project.

Step 2: Count the number of ticks in the columns marked Small, Medium and Large.

Step 3: Using the **Project Sizing Guide (Appendix B),** classify the project size.

Step 4: Using the table on **Project Management Team Resourcing (Appendix C),** review and assign the appropriate Project Management Team Resources. Document all approvals by the Sponsor/Steering Committee/Vice-Chancellor & President.

Step 5: Determine the level of Detail required in the Project Management Documentation and the extent to apply Project Management methodology by referring to the **Project Management Documentation Guide (Appendix D)** and the **Project Management Key Elements and Considerations tables (Appendix E).**   Document all approvals by the Sponsor/Steering Committee/Vice-Chancellor & President.

Step 6: Refer **Project Roles and Project Manager Loading Guidelines (Appendix F)** when assigning Project Management Duties and Responsibilities.

8. What is produced by this process?

The size of the project will determine the level of project management resources and the level of detail and discipline of the project management activity to be applied. Not all projects will require the same

level of resourcing or the same level of documentation and consideration so this process is intended to provide uniformity and transparency while ensuring each project is management appropriately.

The result of this procedure is to ensure a clearly defined and accepted agreement as to how the project will be managed, the resourcing allocated including the detail of the documentation to be produced.

9.   Key Reference Documentation when using these Project Sizing Procedures

This procedure must be followed while also referencing the following documentation:

a)   USP Project Management Framework

b)   USP Capital Building Projects Policy

c)   USP Capital Building Projects Procedures

d)   Financial Regulations

e)   Financial Delegations

f)   Procurement Policy

g)   Strategic Partnerships and Development Assistance Policy

h)   Development Assistance and   Research   Project   Management Policy

i)   Sub Delegations Policy

j)   Retained Earnings, Royalties, Direct and Indirect Costs

10. References

This document extensively references and adopts sections from the Tasmanian Government Project Management Framework, Project Management Fact Sheet: Project Sizing Version: 1.3, November 2008.

Available at:
www.egovernment.tas.gov.au/__data/assets/pdf_file/.../Project_Sizing_Fact_Sheet.pdf

Appendix A - Project Sizing Criteria

Criteria	Small	√	Medium	√	Large	√
Project Period	Less than 6 months	□	6 - 12 Months	□	Greater than 12 months	□
Schedule for Deliverables	Schedule for Deliverables is flexible	□	Schedule can undergo minor variations but the deadlines for deliverables are fixed	□	No Room for flexibility in schedule. Deadlines are fixed	□
Complexity of Solution	The solution for the project is easily understood, readily available, repeatable.	□	While the problem might be identifiable, the solution is not straightforward, unclear or difficult to achieve	□	Both the Problem and the solution are difficult to define or understand, and the solution difficult to achieve	□
Internal Stakeholder Complexities	Internal stakeholders are limited to Single Client Single Sponsor	□	Internal stakeholders consists of multiple internal clients reporting to a single sponsor	□	Multiple internal clients and multiple sponsors	□
External Stakeholder Complexities	Stakeholders are limited to faculty and sections within USP, (external to the client group)	□	There are multiple stakeholders outside USP but within Member Country jurisdictions	□	There are Multiple international stakeholders across USP members countries and beyond	□
Geographic and National Complexities (Site of the installations/activities)	Project Activities is limited to a single location	□	Project activities restricted to a Single Country but with Multiple Locations	□	Project Activities are located in Multiple Countries and in multiple locations	□
Level of Change	Impacts a Single Business Unit	□	Impacts Multiple Business Units	□	USP Wide Impact	□
Total Project Cost	Less than FJD 250K	□	FJD 250K - 1M	□	Greater than 1M	□
Dependencies and Interrelated Projects	No major dependencies or inter-related projects	□	Some dependencies and these are considered low risk	□	High Risk Dependencies or interrelated projects	□
Strategic Importance	Internal Client Interests Only	□	Some direct SP impacts or related to lower priority initiatives in the SP	□	Directly relates to SP initiatives or Section Service Delivery requirements	□

Appendix B - Project Size Guide

Complete the assessment of the various project elements in the Sizing Criteria table above before referencing the table below.

Large Project	Any of the yellow highlighted cells are ticked	Three (3) or more cells ticked from the large column
Medium Project	One (1) cell ticked in the large project category with at least four (4) cells ticked in the medium category	Five (5) or more cells ticked from medium category
Small Projects	Any remaining combinations	

NOTE: After the initial project sizing is done, the project manager should make allowances for other factors applicable in the context of the particular project. Qualitative factors outside of the criteria set here can be considered and the project size should be adjusted accordingly and the factors and decisions regarding them documented appropriately.

Appendix C - Project Management Team Resourcing

	Small Project	Medium Project	Large Project
Size of Project Team (FTEs)	1 Project Coordinator	Between 2 and 3 staff. A Project Manager with at least 1 support staff	Greater than 3 Staff. A Senior Project Manager, an assistant Project Manager an approved set of support staff

Important Notes:

Project Accounting: All projects will require dedicated financial control and oversight ensuring the proper allocation, disbursement, monitoring and reporting of project funds in accordance with the project documentation and agreements. The Project Team will ensure this resource is applied in all cases with oversight provided by central finance.

Small Projects - The Project Sponsor should approve the Project Management Team Resourcing.

Medium Projects - The Project Steering Committee should approve the Project Management Team Resourcing.

Large Projects – The Project Steering Committee and the Vice-Chancellor & President should approve the Project Management Team Resourcing.

Appendix D - Project Management Documentation Guide

The following documentation must be prepared for each project regardless of size or complexity. The detail contained in each document is classified as either brief or detailed:

- Detailed – implies rigid, formal approach using approved standard templates where available
- Brief – covers all other cases

Key Document	Small	Medium	Large
Project Proposal/Space Form	Mandatory/Brief	Mandatory/Detailed	Mandatory/Detailed with SMT approval
Project Business Case	Optional/Brief	Mandatory/Detailed	Mandatory/Detailed
Project Plan & Risk Register (Execution Plan)	Optional/Brief	Mandatory/Detailed	Mandatory/Detailed
Status Reporting (Progress Reports)	Weekly/Brief/1 or 2 sentences	Monthly/ 1 page report of key elements	Monthly/Detailed
Evaluation	Mandatory/Brief	Mandatory/Detailed	Mandatory/Detailed
Closure Documentation	Mandatory/Brief	Mandatory/Detailed	Mandatory/Detailed

Important Notes:

Small Projects - The Project Sponsor should approve the application and detail of the project management documentation and the extent of the application of the key elements and considerations.

Medium Projects - The Project Steering Committee should approve the application and detail of the project management documentation and the extent of the application of the key elements and considerations.

Large Projects – The Project Steering Committee and the Vice-Chancellor & President should approve the application detail of the project management documentation and the extent of the application of the key elements and considerations.

Appendix E - Project Management Key Elements and Considerations

The following key elements need to be considered in a project, regardless of size and complexity. The extent to which these elements are considered will be either brief or detailed.

- Detailed – implies rigid, formal approach using approved standard procedures where available
- Brief – covers all other cases

Key Element	Small	Medium	Large
Planning & Scoping	Brief	Detailed	Detailed
Governance Considerations	Brief	Detailed	Detailed
Organizational Change Management	Brief	Brief	Detailed
Stakeholder Management	Brief	Brief	Detailed
Risk Management	Brief	Detailed	Detailed
Issues Management	Brief	Brief	Detailed
Resource Management	Brief	Detailed	Detailed
Quality Management	Brief	Detailed	Detailed
Reporting	Brief	Detailed	Detailed
Evaluation	Brief	Brief	Detailed
Closure	Brief	Brief	Detailed

Important Notes:

Small Projects - The Project Sponsor should approve the application and detail of the project management documentation and the extent of the application of the key elements and considerations.

Medium Projects - The Project Steering Committee should approve the application and detail of the project management documentation and the extent of the application of the key elements and considerations.

Large Projects – The Project Steering Committee and the Vice-Chancellor & President should approve the application detail of the project management documentation and the extent of the application of the key elements and considerations.

Appendix F – Project Roles and Project Manager Loading Guidelines

Recommended Project Roles by Project Size	Small	Medium	Large
Project manager (per cent time guideline)	10-20%	10-50%	75-100%
Project Sponsor (recommended position)	Head of School or Section	Dean or DVC or Vice-President	Vice-Chancellor & President
Customer liaison	Yes	Yes	Yes
Customer project manager (Only applicable in Large Projects)	No	Optional	Yes - Senior Project Manager
Outsourced Project Manager (To Handle External Stakeholders and Technical Teams)	No	No	Optional
Advisory committee(s)	No	Optional	Required