

# Project Management

## Introducing the CDC Unified Process for Project Management

Approximately two years ago, a CDC Work Group was chartered by the CDC Director to establish a CDC Unified Process (UP). The CDC UP was to be jointly developed by all C/I/Os with the goal of providing a clearly defined approach to successful project management and delivery. The CDC UP Work Group established nine guiding principles for the development of the CDC Unified Process:

1. The CDC UP incorporates applicable industry practices and PHIN and CDC standards, policies and other Federal regulations into a framework relevant to project teams.
2. The CDC UP framework includes the processes required for compliance with applicable Federal regulations and CDC standards and policies.
3. The CDC UP shows the timing, sequence and interrelationship of processes and activities ("what to do and when to do it").
4. The CDC UP provides guidelines, templates and tools for accomplishing project activities ("how to do it"), and the content and concepts of the CDC UP will be incorporated into CDC's knowledge base.
5. The CDC UP is applicable to any project at the CDC and accommodates the needs of various project classes and types (IT, non-IT, complex, fast-track, etc.).
6. The CDC UP is based on industry standards that map to project management lifecycles optimized for CDC's needs.
7. The CDC UP will facilitate consistent and repeatable processes.
8. The CDC UP is designed to help initiatives fulfill their intended objectives, deliver on schedule and within budget, and advance the CDC's goals and health outcomes.
9. The CDC UP will be reviewed and updated as often as necessary to support and advance CDC's mission, health impact and preparedness goals and objectives, and to support the latest advancements in project management processes.

The CDC UP was developed through the activities of an established Work Group and Design Group of C/I/O representatives who engaged CDC process owners, project managers and other stakeholders to identify and document CDC processes and best practices. Since inception, over 70 different CDC employees and/or contractors have been involved in the development of the CDC UP. The CDC UP continues to evolve as processes and federal regulations change.

The CDC UP has evolved into a clearly defined approach to successful project delivery using a

series of scalable project components that facilitate consistent and repeatable project delivery. The UP has become a common framework for delivering projects through the use of tools, techniques, templates, practices and processes that comply with Federal regulations, policies, industry best practices, and PHIN and CDC standards. The CDC UP now includes a collection of project management practices, processes, templates, and tools to structure, track, and manage project activities and deliverables.

The CDC UP has been developed so that it can be applied to any project to increase the efficiency and effectiveness of project management practices and processes. The CDC UP supports project managers by providing project management tools and components that are accessible via the CDC UP website. These artifacts include the CDC UP Framework and numerous Process Guides, Practice Guides, Templates, Checklists, and more.



The **CDC UP Framework** is an architecture based on industry leading best practices and standards designed to promote strategic alignment throughout the CDC. A detailed explanation of the CDC UP Framework and its components, stages, and phases can be found at <http://www.cdc.gov/cdcup/>

**CDC UP Process Guides** help project teams comply with federal regulations, PHIN and CDC policies and standards by presenting requirements in a consistent, easy to understand format.

**CDC UP Practices Guides** are brief documents describing the background, requirements and best practices of an accompanying template.

**CDC UP Templates** are standardized documents with a preset format used as a starting point for project management documents to ensure consistency.

**CDC UP Checklists** are brief documents listing items to be noted, checked, remembered, and delivered when completing an accompanying template. Other tools are also available to assist managers to better manage their projects.

Some of the artifacts available on the CDC UP website today include:

#### **Process Guides**

- *Application Hosting*
- *Classified Information*
- *Contracts Procurement*
- *CPIC*
- *Enterprise Architecture*
- *Operations Designated Server Sites*
- *Operations Mid Tier Date Center*
- *PHIN Messaging*
- *PHIN Vocabulary*
- *Privacy Impact Assessment*
- *Procurements Overview*
- *SDN Application*
- *SDN Digital Certificate*
- *SDN File Transfer*
- *SDN Overview*
- *Section 508*
- *Security*
- *Simplified Acquisitions*
- *Support Provisioning*
- *Task Order*

#### **Practices Guides and Checklists**

- *Change Management*
- *Communication Management*
- *Issue Management*
- *Lessons Learned*
- *Project Charter*
- *Project Close-Out*
- *Project Status Reporting*
- *Project Management Plan*
- *Quality Management Plan*
- *Risk Management Plan*
- *Requirements Management*
- *Scope Planning*
- *Work Breakdown Structure*
- *Project Scheduling*

#### **Templates**

- *Change Management Plan*
- *Change Management Log*
- *Change Request Form*
- *Communication Plan*
- *Communication Matrix*
- *Executive Status Report*
- *Meeting Agenda*
- *Issue Management Log*
- *Lessons Learned Log*
- *Meeting Agendas*
- *Project Kick-Off*
- *Meeting Minutes*
- *Project Charter*
- *Project Management Plan*
- *Project Schedule*
- *Quality Management Plan*
- *Risk Management Log*
- *Risk Management Plan*
- *Stakeholder Analysis*
- *Work Breakdown Structure*

#### **Other tools to assist project managers**

- *Project Management Guide*
- *Process Assessment for Compliance Related Processes*
- *Project Framework Image*
- *UP Mapped to SDLCs*
- *Document Repository*
- *Project Classification Guidance*
- *Artifact Matrix*
- *Learn About Project Management*
- *PM Glossary & Acronym List*

The CDC UP has recently announced the release of a newly enhanced CDC UP website and encourages everyone to use the site as their primary source to learn about the CDC UP, the tools it has to offer, and their application to project management. The

website, <http://www.cdc.gov/cdcup/>, was built with three types of users in mind: those users new to project management, users who are experienced project managers but new to the CDC UP, and those experienced project managers already familiar with the CDC UP looking for specific tools or artifacts.

One of the main highlights of the new CDC UP website is the recently release of the *CDC UP Project Management Guide (PMG)*. The CDC UP PMG provides guidance and advice to Project Managers throughout the life cycle of a project in the form of a step-by-step best practice approach to managing projects. The PMG focuses on an overarching theme of applying good, fundamental, project management best practices that can be applied to all projects (CDC/non-CDC) or project types (IT/non-IT).

Although the PMG is still a work-in-progress, it provides a tremendous amount of useful information to project managers, especially through the planning phase of a project. Additional content is being produced as rapidly as possible and is posted to the website as soon as it's completed. A limited functionality version of the CDC UP PMG is also available for download in PDF format.

The CDC Unified Process is also considering the possibility of changing the name of the UP. Often the term "Unified Process" is associated with Rational Unified Process, a software development life cycle. The UP Team is considering name change suggestions from the CDC community that may more accurately reflect the broader scope of the UP Project Management Framework as it applies to all projects. Let us know your thoughts by visiting the CDC UP website at <http://www.cdc.gov/cdcup/>

Subscribe to the CDC UP Project Management Newsletter at <http://www.cdc.gov/cdcup/>

### **Contact the CDC Unified Process Team**

The *CDC Unified Process Project Management Newsletter* is authored by Daniel Vitek MBA, PMP and published by the National Center for Public Health Informatics.

For questions about the CDC UP, comments regarding this newsletter, suggestions for future newsletter topics, or to subscribe to the CDC UP Project Management Newsletter please contact the CDC UP Team at [cdcup@cdc.gov](mailto:cdcup@cdc.gov)

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