Distinguishing the Role of PM vs IST Manager

There are defined project roles and responsibilities for a Project Manager (PM) and a Functional Manager posted on the Portfolio Management Group's website. An IST Manager would be the equivalent of a project's Functional Manager role by directly being responsible for an area the project will impact, and/or providing some of their resources to do project work. This chart is meant to complement the posted project roles and responsibilities by providing an example of further details on the responsibilities between an IST Manager and a PM.

The responsibilities should be distributed to ensure that the PM can remain responsible for the success of the project itself and the IST Manager, who will have to take on the deliverable(s) from an operations perspective, is receiving a sustainable, supportable deliverable that meets expectations and requirements.

Project Life Cycle Phase	PM Role	IST Manager role
Initiation	• Gather information needed to draft charter, understand stakeholders, and do a kick off	• Provide information towards scope, understanding of stakeholders, possible success criteria, business drivers, et cetera for PM to understand what the project is supposed to be and how success should be measured
Planning (defining work, schedule, and resource requirements)	• Collect information to identify resource requirements/skills required for project work • Negotiate & secure resources • Schedule and facilitate planning meetings • Facilitate WBS sessions, create WBS, understand dependencies • Create the project management plan	• Assist PM in identifying appropriate people PM should talk to and be introduced to, if needed • Understand priority and dependencies of this project in relation to other work within IST Manager's area of responsibility (sub-portfolio). Understand and communicate resource capacity and over-allocations due to other work commitments within IST Manager's area of responsibility.

Project Life Cycle Phase	PM Role	IST Manager role
	• Collect information on tasks and estimates and create schedule and milestones	• Inform PM which of the IST Manager's resources can be committed to project and their FTE commitment • May act as SME to assist in defining the work and breaking down estimates within their area of responsibility that the project impacts
Execution	• Collect and report on status of project; ensure appropriate discussions occur with IST Manager and other key stakeholders (e.g. Sponsor) if status starting to look like it will change to a yellow or red • Update the plan and schedule, as required • Ensure proper change control • Understand impacts to project due to change requests, delays on tasks, et cetera • Escalate resource issues with IST manager for their resources, if required (performance, availability) • Assign ownership to issues, risks, etc and follow up to confirm action is being taken. Ensure risks are monitored throughout execution.	• Keep informed on status updates, change requests, and resource issues pertaining to IST Manager's resources and impact to IST Manager's area of responsibility • Actively assist with looking for solutions to bring the project back to green if it turns yellow or red • Pursue any assigned issues or risks • Act as a SME for area of responsibility impacted by project, if applicable • May be asked to provide support for escalation of roadblocks, issues, etc • Identify any cross departmental opportunities for synergy • Keep in touch with Director and/or Assistant Director

Project Life Cycle Phase	PM Role	IST Manager role
	• Schedule, plan, and run meetings with various governance groups pertaining to project. Keep governance and sponsor informed on status, issues, and risks • Estimate, baseline, and maintain overall project budget. Perform appropriate level of cost management • Execute any procurement for project, manage vendor contracts • Create, maintain, and ensure appropriate execution of a project communications plan • Keep resources up-to-date re: expectations re: tasks, schedule, and overall project status, etc. Deal with project-specific resource issues. • Ensure reviews and sign offs are included in plan and executed appropriately. Understand quality requirements and measurements and ensure they are completed	• Take ownership of assigned issues/risks and provide updates/feedback as appropriate. • Participate in governance meetings representing the IST deliverables. • Provide any impacts to budget or costs that PM may not know about • Provide input and/or review documentation and contracts. May be a participant of the evaluation team to evaluate submissions and choose the winning bid. • Provide feedback into the communications plan and provide support, as appropriate, to communicate key messages • Address any resource concerns that may be escalated by the PM, provide people-management to IST resources (E.g. Performance reviews, vacation approval, etc.). Ensure resources available to project based on original FTE commitment and communicate any changes to this commitment to PM

Project Life Cycle Phase	PM Role	IST Manager role
	• The PM is responsible for maintaining the project relationship with the vendor for project management related items such as status reporting, invoice approval, cost reporting, issues/risk management, contract and statement of work negotiations.	• Provide input into possible quality requirements and measurements pertaining to IST Manager's area of responsibility. May be asked to do some quality measures for area of responsibility. • The IST Manager who is responsible for the area impacted by the vendor's deliverable(s) will interact with the vendor from the perspective of developing and maintaining an ongoing support/service relationship, as well as any clarification on requirements for the deliverable.
Close out	• Complete activities and documentation as per standard close out process (E.g. Close Out survey, Summary of Lessons Learned, Project close out report, project success).	• Participate in Close Out activities and work with PM on transitioning deliverable to operations within IST Manager's area of responsibility. May be owner of some success criteria measurements for project.