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ANNUAL CONFERENCE 2015

Building Successful IT Governance, Portfolio, and Project Management Processes

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Abstract

Join this seminar to focus on the human and technical aspects, considerations, and barriers when implementing an IT governance process. Learn how to design a strategic governance process to fit your organization and how to develop the processes and tools for portfolio and project management to support the governance process and successfully execute projects.

Learning Objectives

- Determine considerations, options, and barriers for implementing IT governance

- Design IT governance to fit your own institution

- Explore the design and implementation of portfolio and project management
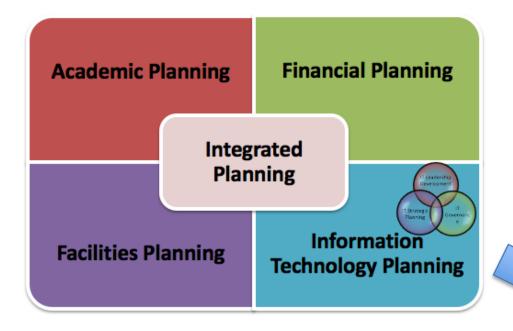
Workshop Overview
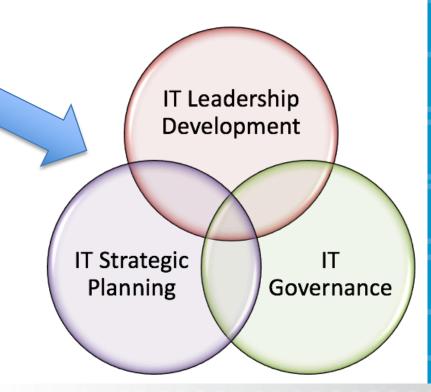
1. Integration of IT Governance and Portfolio and Project Management for Success

2. IT Governance in Higher Education

3. Portfolio and Project Management Implementation

- Three group exercises

Workbook Contents

1. Presentation

2. Exercises

3. Supplemental information

   1. Select IT governance references (Educause, ECAR, PMI references)

   2. Example materials such as charter, reports, resource forecast

   3. Project and program management toolkits

IT Planning in Higher Education
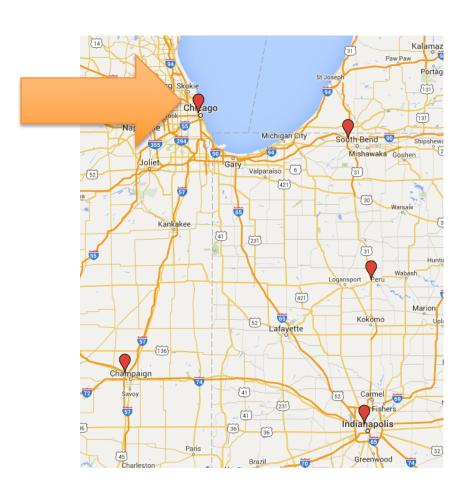
Strategy sets destination; governance provides route
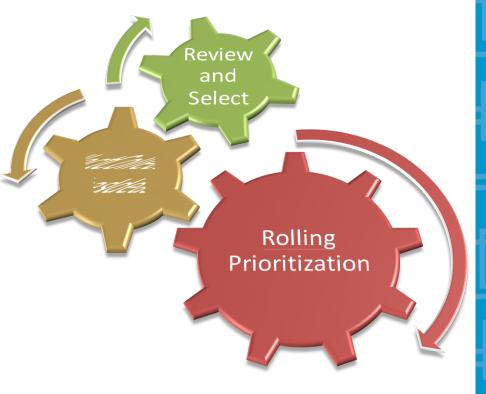
IT Governance

- Who, Why & How to allocate IT resources
- IT Governance defines the processes, components, structures, and participants for making decisions regarding the use of IT

Review and Select

Rolling Prioritization
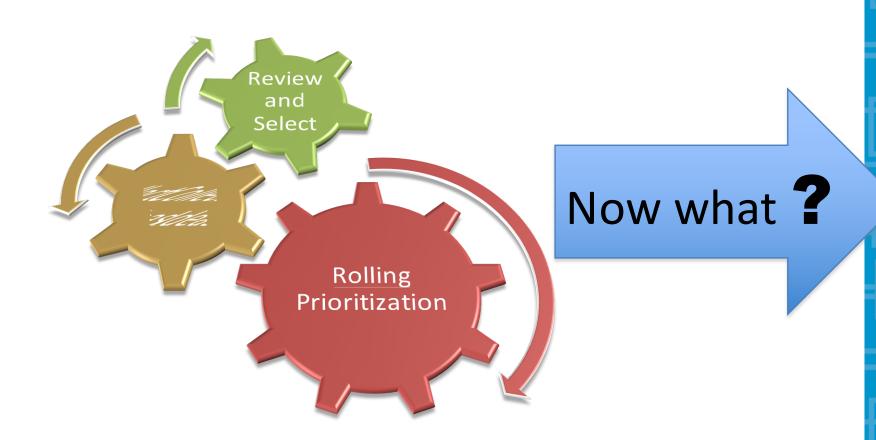
ITG – Why is it important?

- Decision-making and transparency
- Strategic alignment of enterprise and IT
- Resource allocation and management
- Performance management
- Collaboration
- Standards and policy
- Transparency
- Faculty, staff and students are different

EDUCAUSE Center for Applied Research ECAR Research Study 5, 2008 - FINDINGS

- Positive factors for ITG effectiveness:
    - Active design of ITG
    - Ability of ITG participants to describe ITG accurately
    - Frequency of participation, providing input, taking part in decision making
    - ITG involvement in formal project review
    - ITG involvement in institutional budgetary process
    - Incorporation of measurement and review in ITG

Do you need ITG?

Review and Select

Rolling Prioritization

Now what **?**
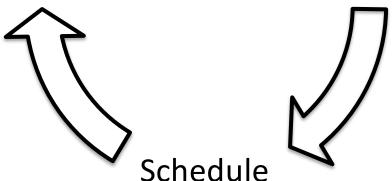
Making it work: Portfolio and Project Management

- Facilitate ITG
- Manage schedule and resources
- Monitor and control portfolio
- Project management center of excellence
- Project execution

Execute

Monitor & Control

Schedule
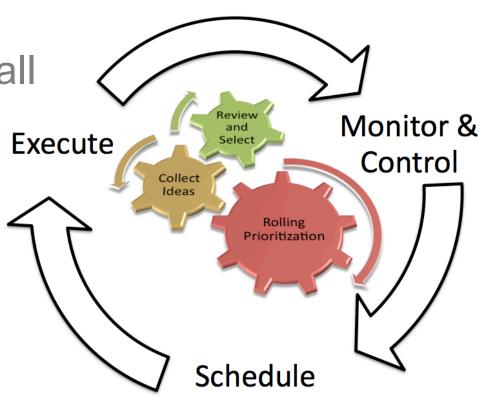
+project management center of excellence

Governance, Portfolio and Project Management (GPPM)

In order to be most successful, you need all of the pieces.

- IT Governance
- Portfolio Management
- Project Management

Execute

Review and Select

Collect Ideas

Monitor & Control

Rolling Prioritization

Schedule

+project management center of excellence

Group Interactive Activity

●

Challenges and Successes with ITG and PPM

Group discussion on participant's challenges and successes with IT Governance and PPM – 15 minutes

- Reflect on the current state of IT Governance, Portfolio, and Project Management at your institution.
  - What works well?
  - What are areas for improvement?
  - How would you like to see things change?

Challenges and Successes with IT Governance and PPM

What works well?

Challenges and Successes with IT Governance and PPM
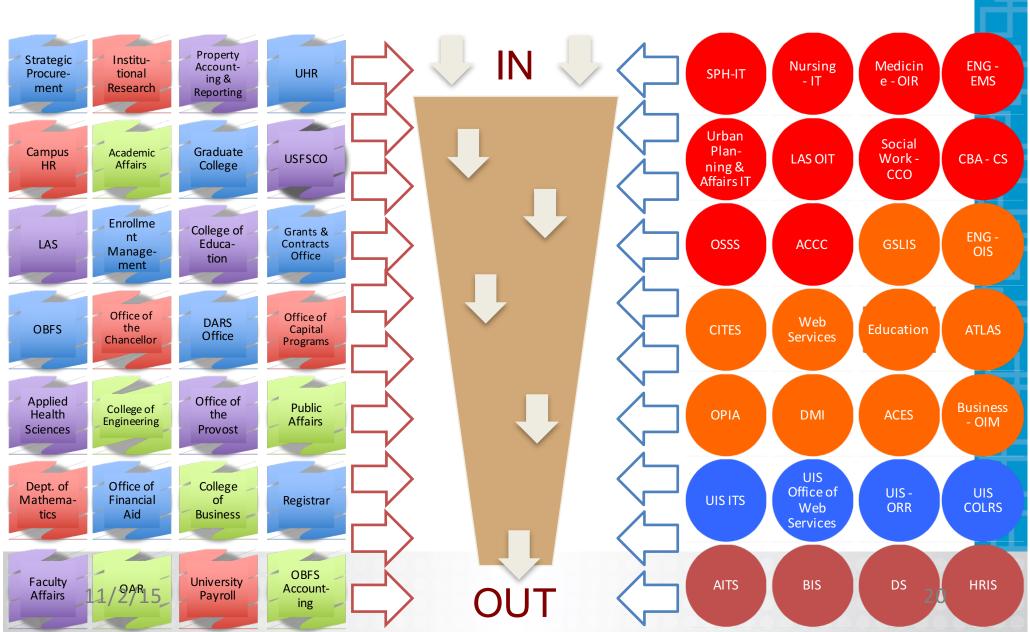
What are areas for improvement?

Challenges and Successes with IT Governance and PPM
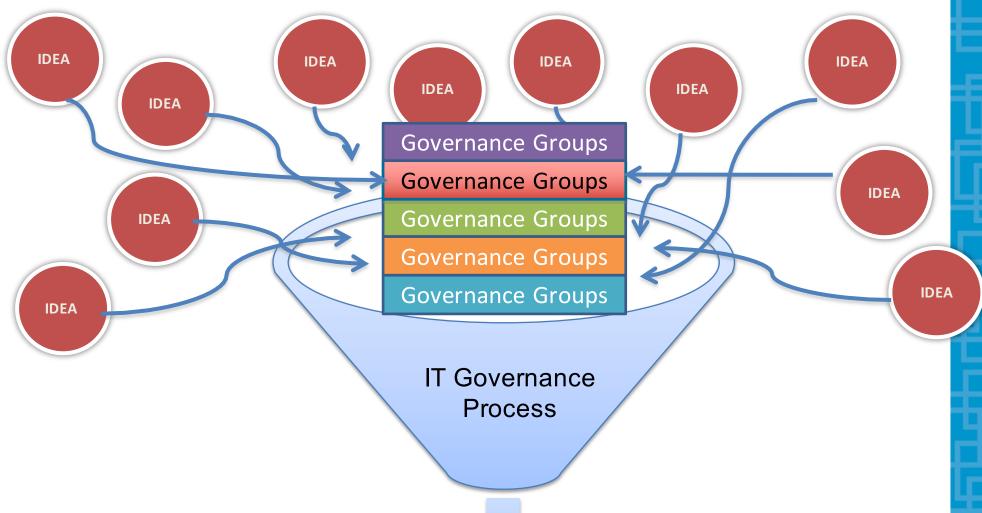
How would you like to see things change?

IT Governance
in Higher Education

Scope of Customers and Providers for IT

IN

OUT

Strategic Procurement	Institutional Research	Property Accounting & Reporting	UHR
Campus HR	Academic Affairs	Graduate College	USFSCO
LAS	Enrollment Management	College of Education	Grants & Contracts Office
OBFS	Office of the Chancellor	DARS Office	Office of Capital Programs
Applied Health Sciences	College of Engineering	Office of the Provost	Public Affairs
Dept. of Mathematics	Office of Financial Aid	College of Business	Registrar
Faculty Affairs	OAR	University Payroll	OBFS Accounting

SPH-IT	Nursing - IT	Medicine - OIR	ENG - EMS
Urban Planning & Affairs IT	LAS OIT	Social Work - CCO	CBA - CS
OSSS	ACCC	GSLIS	ENG - OIS
CITES	Web Services	Education	ATLAS
OPIA	DMI	ACES	Business - OIM
UIS ITS	UIS Office of Web Services	UIS - ORR	UIS COLRS
AITS	BIS	DS	HRIS

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20

Requires a repeatable, rational process to collect ideas, select initiatives, prioritize

IDEA

Governance Groups
Governance Groups
Governance Groups
Governance Groups
Governance Groups

IT Governance Process

Approved Initiatives and Priorities

ITG – Considerations

- Size and shape of the organization
- Structure of IT and the funding model
- Scope of governance
- Scarcity and competition for limited resources – What is your level of demand?
- Desired levels of control and transparency
- Value placed on IT by stakeholders.
- Endorsement and empowerment by non-IT people
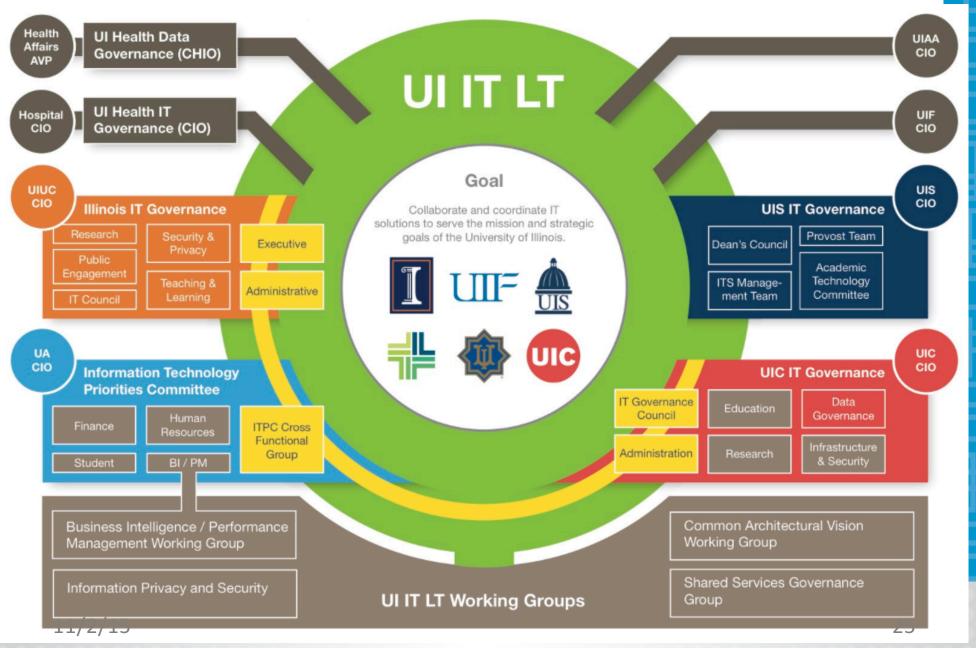
ITG Components – Building the model

A Framework for Discussion: A university-level framework from the University of Illinois is presented as an example to facilitate further discussion. This model provides a framework for a governance model, but is not intended to suggest a final form. The model is complex because it includes many elements of governance and relates them to each other. Not all elements need to be included in a successful governance implementation but, if they are, the model shows how they are connected.

ITG Components – Higher Education Examples
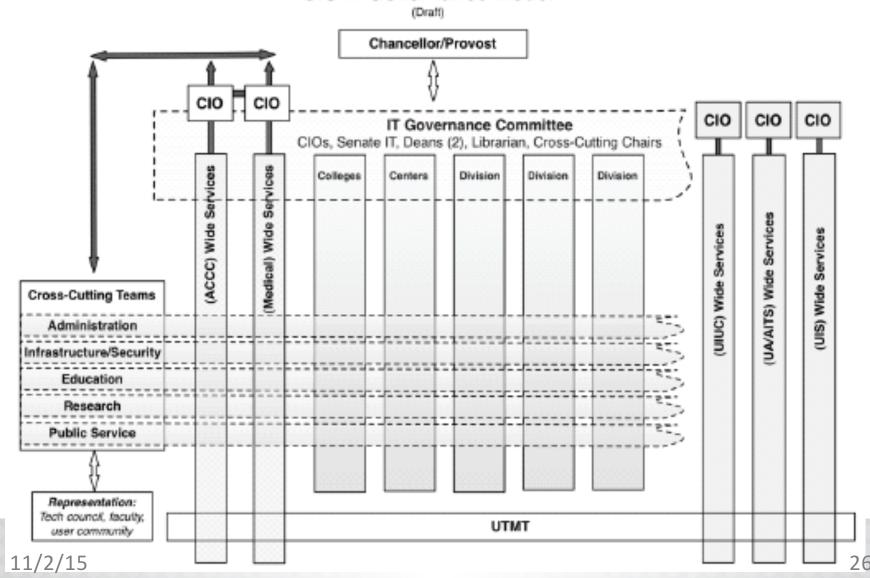
- http://oregonstate.edu/admin/itsc/it-governance-structure

- http://www.uta.edu/oit/it_governance/overview.php

- http://www.itpc.uillinois.edu/

- http://www.nextgen.umich.edu/governance/governance-chart.php

- http://www.uvic.ca/shared/shared_about/GovernanceUpdate2010.ppt

ITG Model Components – University example

ITG Model Components – Campus example
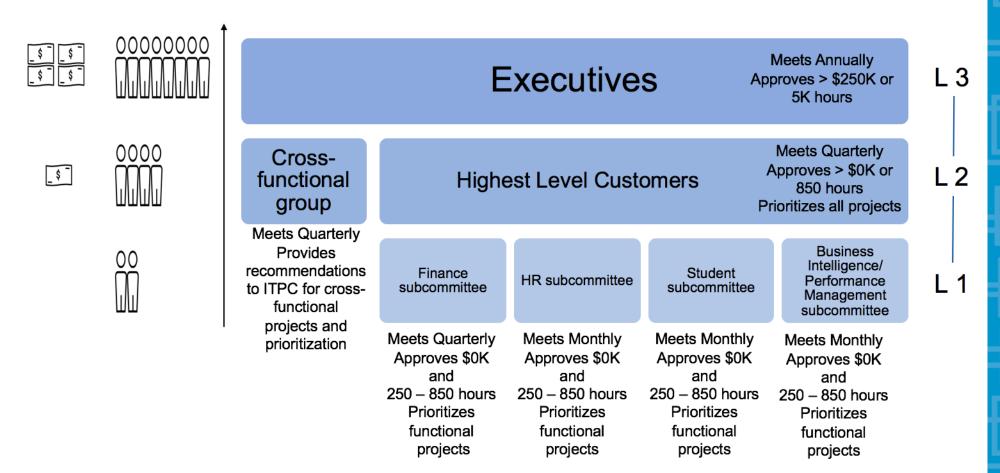
UIC IT Governance Model
(Draft)
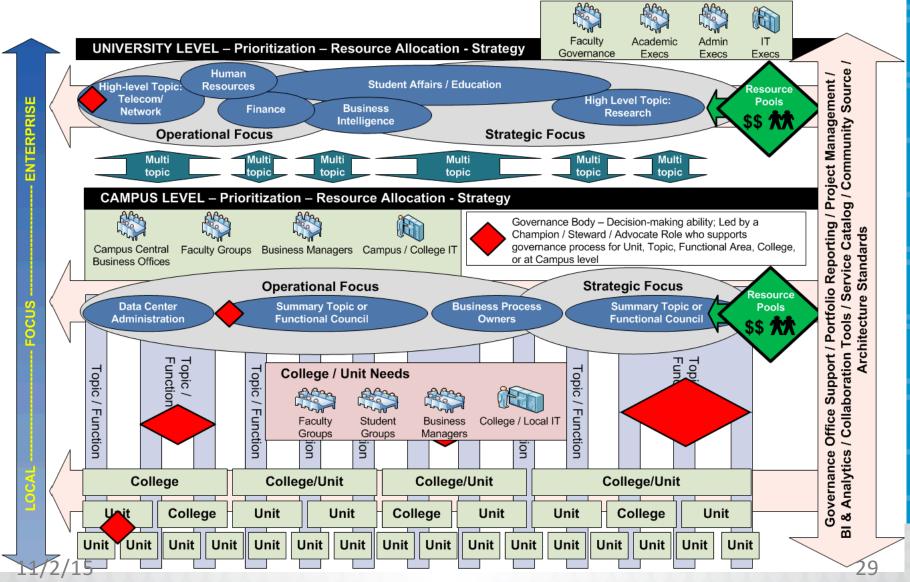
ITG Model Components – Campus example

ITG Model Components – IT for Supporting University Business Processes example

	Cross-functional group	Executives	Meets Annually Approves > $250K or 5K hours	L 3
		Highest Level Customers	Meets Quarterly Approves > $0K or 850 hours Prioritizes all projects	L 2

Executives
Meets Annually
Approves > $250K or 5K hours
L 3

Cross-functional group
Highest Level Customers
Meets Quarterly
Approves > $0K or 850 hours
Prioritizes all projects
L 2

Meets Quarterly
Provides recommendations to ITPC for cross-functional projects and prioritization

Finance subcommittee	HR subcommittee	Student subcommittee	Business Intelligence/ Performance Management subcommittee	L 1
Meets Quarterly Approves $0K and 250 – 850 hours Prioritizes functional projects	Meets Monthly Approves $0K and 250 – 850 hours Prioritizes functional projects	Meets Monthly Approves $0K and 250 – 850 hours Prioritizes functional projects	Meets Monthly Approves $0K and 250 – 850 hours Prioritizes functional projects	

ITG Components – Building the model

ITG Components – Building Blocks for Model

Focus

- **Purpose and Scope:** What is it that needs to be governed? What are your institutional priorities?

- **Participants:** Who should participate? Who should advise and who should make decisions? What are the key roles to identify? How are they interconnected?

- **Decision-making:** What decisions are made at the different levels/groups? What resources will be allocated via the process?

- **Structure:** What are the layers to the governance structure? How are they interconnected?

- **Communication and Coordination:** Who will work behind the scenes to facilitate the process?

Build an IT Governance Model
Group Interactive Activities

We will:

- Walk through defining the components for an ITG structure you are interested in building

- Work with colleagues to discuss your experiences, challenges, and successes with ITG

Workshop Feedback: Actual feedback from ITG design workshops

ITG Model Components

Focus

Purpose and Scope of the problem to solve

- What is it that needs to be governed?
    - Topics / Functions / Summary Topics
    - Units / Colleges
- What is it that does not need to be governed?

Summary Topic or Function

Topic / Function

Topic / Function

Topic / Function

College	College/Unit	College/Unit	College/Unit		
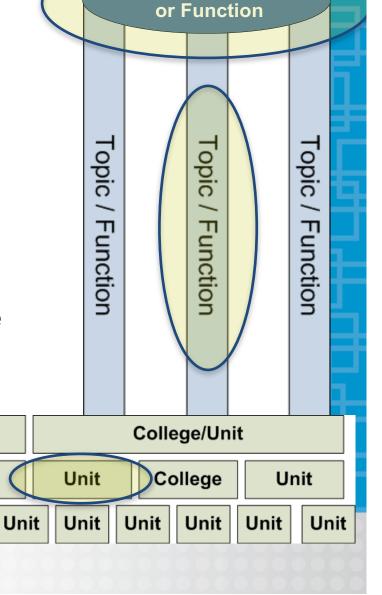
Unit	College	Unit	Unit	College	Unit	Unit	College	Unit

Unit	Unit	Unit	Unit	Unit	Unit	Unit	Unit	Unit	Unit	Unit	Unit	Unit	Unit	Unit

ITG Model Components – What needs to be governed? (examples)

Education	Research	Infrastructure and Security	Public Engagement
Administrative IT	Web Services	IT Strategic Planning	Policy Development
Prioritization	Student Systems	Facilities Systems	Research Administration Systems

ITG Model Components –
What needs to be governed? (examples)

Education

- Learning Management Systems
- Instructional Technologies
- Public Labs
- Change Management
- Student Access to Resources

Research

- User Support Coordination
- Research Computing Resources
- Collaboration Technologies
- Grants Administration
- Technical Support
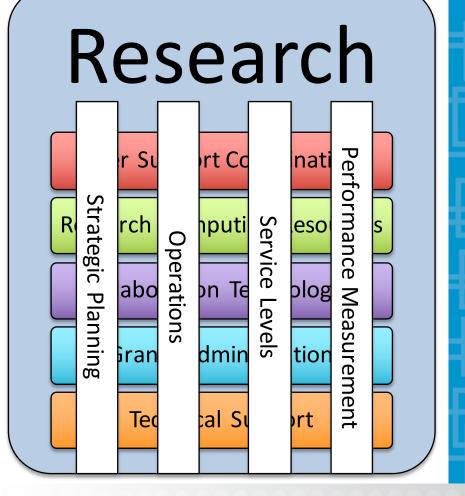
ITG Model Components –
What needs to be governed? (examples)

ITG Model Components –
What needs to be governed? (examples)

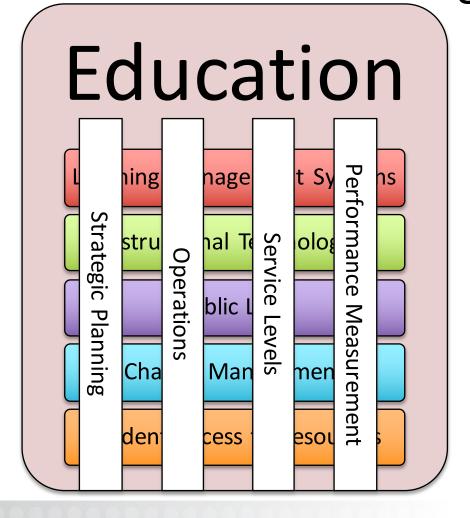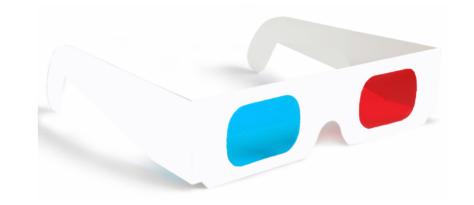# ITG Model Components –
Can become complex
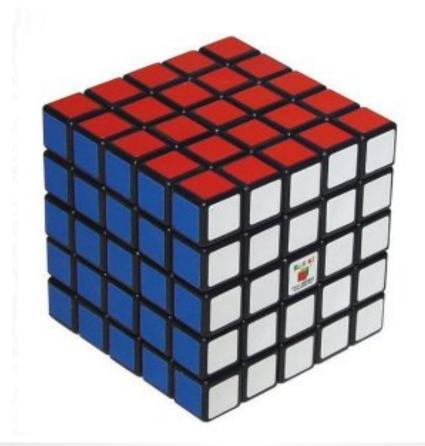
IT Governance in 3D

ITG Model Components

Many dimensions to manage and organize

ITG Model Components

Purpose and Scope of the problem to solve – Example:

Govern IT Projects that Support Business Processes Across the University

- The Information Technology Priorities Committee (ITPC) process functions to provide a common approach to solicit, review, prioritize and execute information technology projects involving University Administration (UA) information technology resources including:
  - Any project that involves resources from a UA unit, or campus based unit that plans to offer an administrative system for the entire campus.
  - Any project that will interface with an Enterprise system.
  - Any project that is administrative in nature, and wishes to utilize funding from the central pool of administrative information technology dollars allocated by the Academic Affairs Management Team (AAMT).
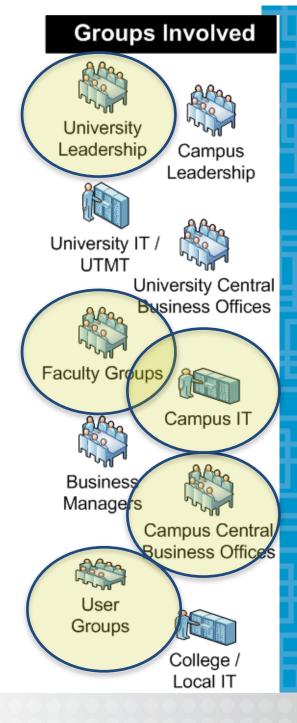
Workshop Feedback:
What is it that needs to be governed?

- Must be an overarching governance structure to guide the various governance components

- Group should not only look at new things, should also consider decommissioning services

- Need service catalogs in order to identify what does/does not exist; gaps and redundancies

- Link governed items/services to strategic university mission driven goals

- Should encourage innovation and embrace some risk

- Connections / coordination / communication throughout

- Clear entrance workflow and process for projects/topics

ITG Model Components

Participants in the process

- Who should participate?
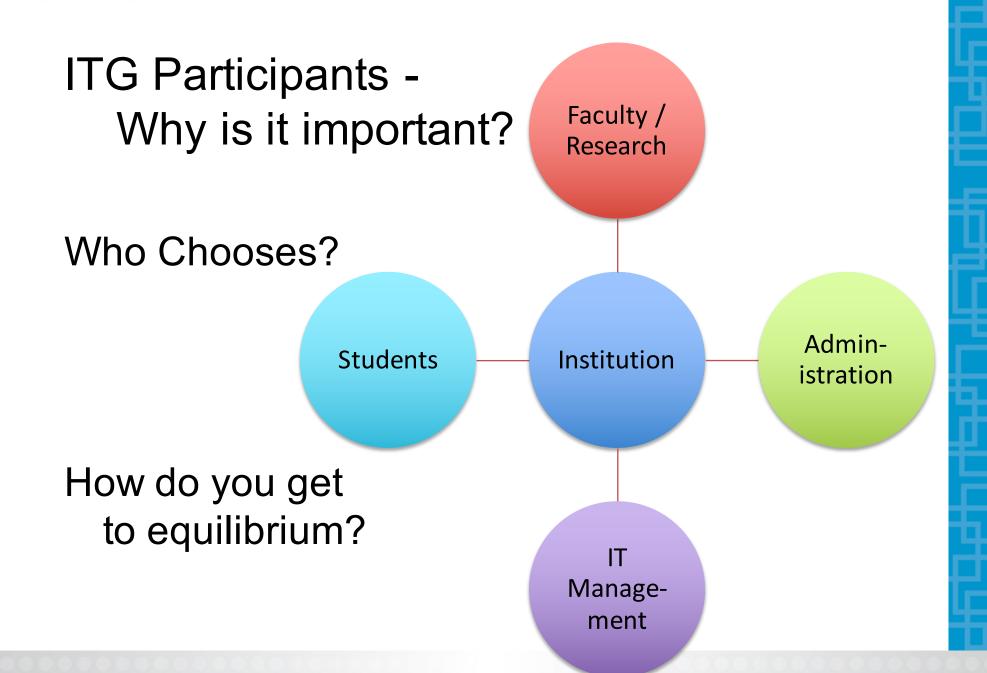
- Who should advise and who should make decisions?

    - Existing groups / Positions / Functions

    - Examples:
        - Faculty groups – e.g. Faculty IT Senate, Council of Deans
        - Executives – e.g. AVP Finance or Asst. Provost for Student Affairs
        - Administrative Offices – Central and Distributed – Director of University HR or Registrar
        - IT Pros – e.g. Director of Decision Support
        - Student groups – e.g. Student Senate

Groups Involved

University Leadership
Campus Leadership
University IT / UTMT
University Central Business Offices
Faculty Groups
Campus IT
Business Managers
Campus Central Business Offices
User Groups
College / Local IT

ITG Participants - Why is it important?

- Who Chooses?
  - Example – Central IT Group
    - Without ITG – Internal decisions by IT management regarding project selection, prioritization, and resource allocation for services

    - With ITG – External customers propose projects, prioritize them, and resource allocation is a byproduct of these decisions and constituent demand for services

ITG Participants - Why is it important?

Who Chooses?

How do you get to equilibrium?

Faculty / Research

Students

Institution

Admin-istration

IT Manage-ment

ITG Model Components – Participants (examples)

Existing Groups	New Groups	Roles
• Council of CIOs • Faculty IT Senate • IT Pros • Council of Deans • CAV • Student Senate • Business Managers • IT Priorities Committee	• Functional Groups • LMS Advisory Council • Shared Infrastructure • Identity Management • Business Process • WCMS	• Advisory & Decision-making • Group Sponsors • Chairs / Leads / Owners • Governance Office / Portfolio Management

ITG Model Components

Participants in the process – Example:

ITPC	Finance ITPC	HR ITPC	Student ITPC
UA - Senior Associate Vice President, Office of Business and Financial Services	UA-OBFS, Assistant Vice President Admin Services (Chair)	UA - Director Employee Relations and Human Resources	UIC – Admissions Representative
UA - Associate Vice President, AITS (Chair)	UA-OBFS, Controller	UA - Assistant Vice President, Human Resources	UIC - Financial Aid Representative
UA - Assistant Vice President for Academic Affairs	UA-OBFS, Executive Assistant Vice President for Business and Finance (UIC)	UA - Director of Human Resources Information Systems	UIC - Provost/Chancellor appointee
UA - Assistant Vice President and Dean, Academic Affairs	UA-OBFS, Assistant Vice President for Business and Finance (UIS)	UIC - Director of HR Shared Services, Human Resources	UIC - Records and Registration Representative
UA - Assistant Vice President, Human Resources	UA-OBFS, Assistant Vice President for Business and Finance (UIUC)	UIC - Associate Director & Acting Director, Faculty Affairs HR	UIC – Systems Representative
UA - Assistant Vice President, Decision Support	UA-Capital Programs & Real Estate Services	UIC - Vice Chancellor for Human Resources, Human Resources	UIS – Admissions Representative
UIC – Provost/Chancellor appointee	UIC Campus Representative	UIS - Assistant Provost	UIS - Financial Aid Representative
UIC – Faculty Representative	UIC Provost Office	UIS – Director of Human Resources	UIS - Records and Registration Representative
UIS – Provost/Chancellor appointee	UIS Provost Office	UIUC - Associate Director, Academic Human Resources	UIS – Systems Representative
UIS – Faculty Representative	UIUC Provost Office	UIUC - Associate Provost for Human Resources	UIUC – Faculty Representative
UIUC – Provost/Chancellor appointee	UIUC Campus Representative	UIUC - Director of Academic Human Resources	UIUC – Faculty Representative
UIUC – Faculty Representative			UIUC - Financial Aid Representative

ITG Model Components

Faculty Involvement Levels

HIGH
- Direct participation on governance committees

MEDIUM
- Advisory input from existing faculty governance committees or individual faculty

LOW
- Actively and passively communicate ITG activities with faculty community; respond to requests and inquiry

Workshop Feedback:
Participants in the governance process

- The key element is how the structure connects everyone and connects to other decision making processes

- Identify/Review/Repurpose/Dissolve current committees

- Catalog committees / require charter & documentation

- Participants should be connected relative to their experience – strategic, tactical, operational

- Governance to identify resolutions among different recommendations – SMEs / technologists need advisory roles for these decisions

- Correct balance of stakeholders – academic, research, administrative, others

ITG Model Components

Decision-making

- Specific decision points

- Set policy and standards

- Project selection & prioritization

- Resource allocation

  - Resources have to be connected to decision points

  - Incentives for participation
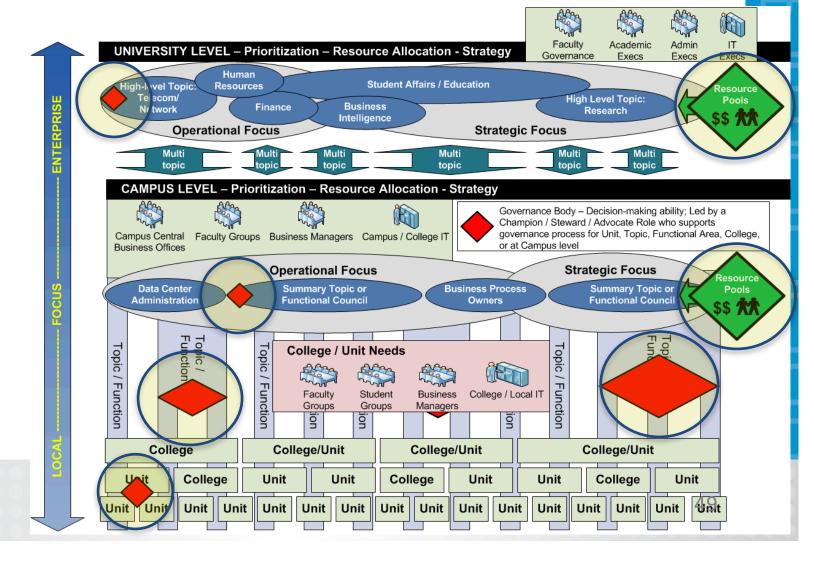
Governance Body – Decision-making ability; Led by a Champion / Steward / Advocate Role who supports governance process for Unit, Topic, Functional Area, College, or at Campus level
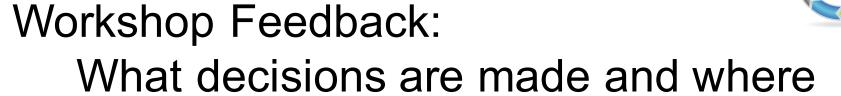
Resource Pools
$$

ITG Components – Building the model

What and where are decisions made?

ITG Model Components (example)

- Funding Model Components for Governance Consideration
  - Base funding for enterprise or campus services
  - Project funding for one-time initiatives
  - Ancillary funding for college / department level services
  - Fee for service – use-based charge-back
  - Unfunded – beyond resource capacity
  - University of Victoria - http://www.uvic.ca/shared/shared_about/GovernanceUpdate2010.ppt

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Type	Type Rank	Overall Rank	Initiative
Base	1	1	Project/Service A
	2	2	Project/Service B
	3	3	Project/Service C
	4	6	Project/Service D
	5	11	Project/Service E
	6	12	Project/Service F
Project	1	4	Project/Service G
	2	7	Project/Service H
	3	9	Project/Service I
Ancillary	1	5	Project/Service J
	2	8	Project/Service K
Fee	1	10	Project/Service L
Unfunded	1	13	Project/Service M
	2	14	Project/Service N

Workshop Feedback:
What decisions are made and where

- Clear review and decision points for projects

- Different review points may include architecture, security, policy, scope, funding, stakeholders

- Need a process defined for exceptions

- Consider actual costs, maintenance & support, opportunity cost to not implement or widely support

- Incentives to empower collaboration

- Trade-offs between local vs. central services

ITG Model Components

Structure: What are the layers to the governance structure and how do they interconnect?

- What are the responsibilities and composition at the different layers?
- Where and how do the levels and groups interconnect?
- Ownership and Accountability

L 3

L 2

L 1

Campus

College 1   College 2

Unit A   Unit B   Unit C

Example of Responsibilities for a Group

- Provide oversight, review, strategy, communication for business process and administrative projects that:

  - Involve resources from our unit involves an enterprise business system
  - Will interface with an enterprise system
  - Wish to utilize funding from the central pool of $$ & labor
  - Scope of Enterprise Systems
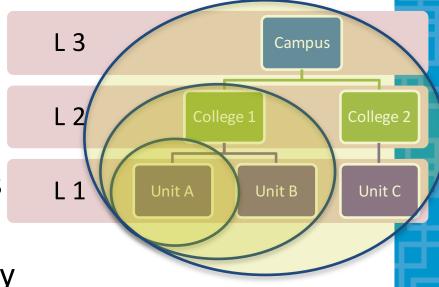
299,000	Student Application Transactions	479,000	Payment Requests Processed
12,343,500	Registration Record Transactions	138,100	HR Front-end Transactions
556,000	Financial Aid Disbursements	153,000	Travel Expense Reimbursements
113,000	Transcripts Processed	240,000	Data Warehouse Sessions
157,500	eProcurement Transactions	882,000	Regular Payroll Transactions
25,000	Non-iBuy Purchase Orders	99.99%	FY 14 Banner Availability
467,000	Financial Aid Records		

Workshop Feedback:
Layers to the governance structure

- Responsibility at all levels

- Increased collaboration between groups leads to improved culture and climate of IT

- Who sets the charge, who determines the budget, who assigns the resources

- Accountability throughout structure; recommendations and decisions need to carry through other points in governance structure

- Need exists for project management, oversight, and coordination for multi-unit major initiatives
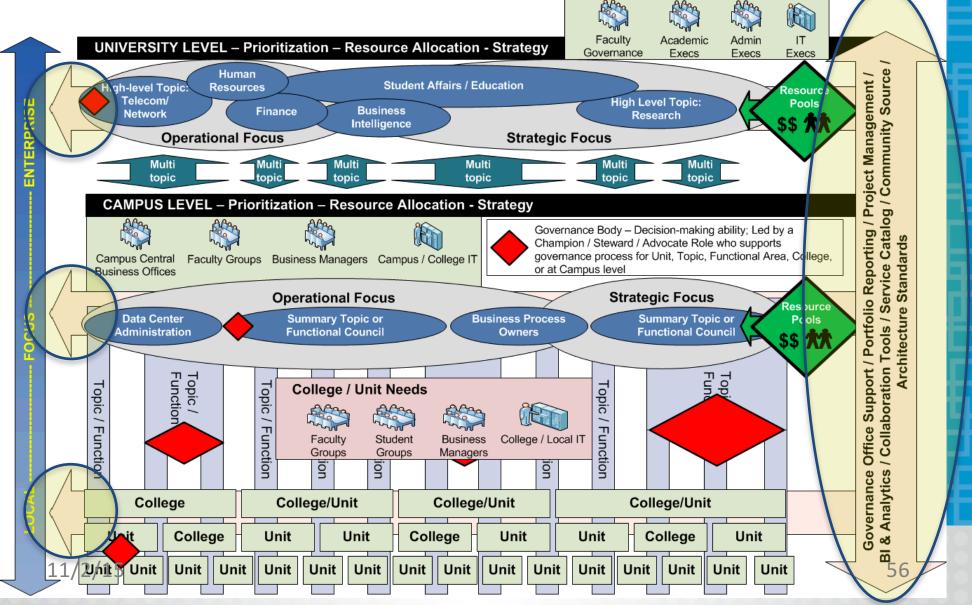
ITG Model Components

Communication and Coordination

- Transparency (in the eye of the beholder)
- Communication about the process
- Central information resources for governance operations / decisions
- Service / project inventory
- Portfolio and Project Management Office or portfolio management role to support the ITG process

ITG Components – Building the model

Workshop Feedback: Communication and coordination factors

- Communication and transparency key to the success of the ITG structure and process

- Need dedicated staff to drive process

- Easy way for individuals to provide feedback and input

- Documentation needs to capture how decisions were made and their path through the ITG

- Incorporate a means for checks and balances

- Design both active and passive forms of communication throughout structure

Right-size your Governance Process

- Process should accommodate work of different sizes with the appropriate review rigor based on cost and impact

Simple > > > > > > > > > > > > > Complex

Level 1 project
UIUC Winter term creation

Level 2 project
Automated Grade Change Process

Level 3 project
Travel & Expense Management

ITG Model Components – IT for Supporting University Business Processes example

	Executives	Meets Annually Approves > $250K or 5K hours	L 3
Cross-functional group	**Highest Level Customers**	Meets Quarterly Approves > $0K or 850 hours Prioritizes all projects	L 2
Meets Quarterly Provides recommendations to ITPC for cross-functional projects and prioritization	Finance subcommittee / HR subcommittee / Student subcommittee / Business Intelligence/ Performance Management subcommittee		L 1

Finance subcommittee
Meets Quarterly
Approves $0K and
250 – 850 hours
Prioritizes functional projects

HR subcommittee
Meets Monthly
Approves $0K and
250 – 850 hours
Prioritizes functional projects

Student subcommittee
Meets Monthly
Approves $0K and
250 – 850 hours
Prioritizes functional projects

Business Intelligence/ Performance Management subcommittee
Meets Monthly
Approves $0K and
250 – 850 hours
Prioritizes functional projects

ITG Model Components – IT for Supporting University Business Processes example

Executives — Meets Annually Approves > $250K or 5K hours — L 3

Cross-functional group | Highest Level Customers — Meets Quarterly Approves > $0K or 850 hours Prioritizes all projects — L 2

Meets Quarterly Provides recommendations to ITPC for cross-functional projects and prioritization

| Finance subcommittee | HR subcommittee | Student subcommittee | Business Intelligence/ Performance Management subcommittee | L 1 |

Finance subcommittee — Meets Quarterly Approves $0K and 250 – 850 hours Prioritizes functional projects

HR subcommittee — Meets Monthly Approves $0K and 250 – 850 hours Prioritizes functional projects

Student subcommittee — Meets Monthly Approves $0K and 250 – 850 hours Prioritizes functional projects

Business Intelligence/Performance Management subcommittee — Meets Monthly Approves $0K and 250 – 850 hours Prioritizes functional projects

ITG Model Components – IT for Supporting University Business Processes example

Executives — Meets Annually, Approves > $250K or 5K hours — L 3

Cross-functional group — Meets Quarterly, Provides recommendations to ITPC for cross-functional projects and prioritization

Highest Level Customers — Meets Quarterly, Approves > $0K or 850 hours, Prioritizes all projects — L 2

L 1:

Finance subcommittee — Meets Quarterly, Approves $0K and 250 – 850 hours, Prioritizes functional projects

HR subcommittee — Meets Monthly, Approves $0K and 250 – 850 hours, Prioritizes functional projects

Student subcommittee — Meets Monthly, Approves $0K and 250 – 850 hours, Prioritizes functional projects

Business Intelligence/Performance Management subcommittee — Meets Monthly, Approves $0K and 250 – 850 hours, Prioritizes functional projects

Flexibility of Governance Process

Simple > > > > > > > > > > > > > > > Complex

Level 1 project

UIUC Winter term creation

Review steps:

- L1 Project proposal completed
- Review at functional subcommittee
- REVIEW COMPLETE

Level 2 project

Automated Grade Change Process

Review steps:
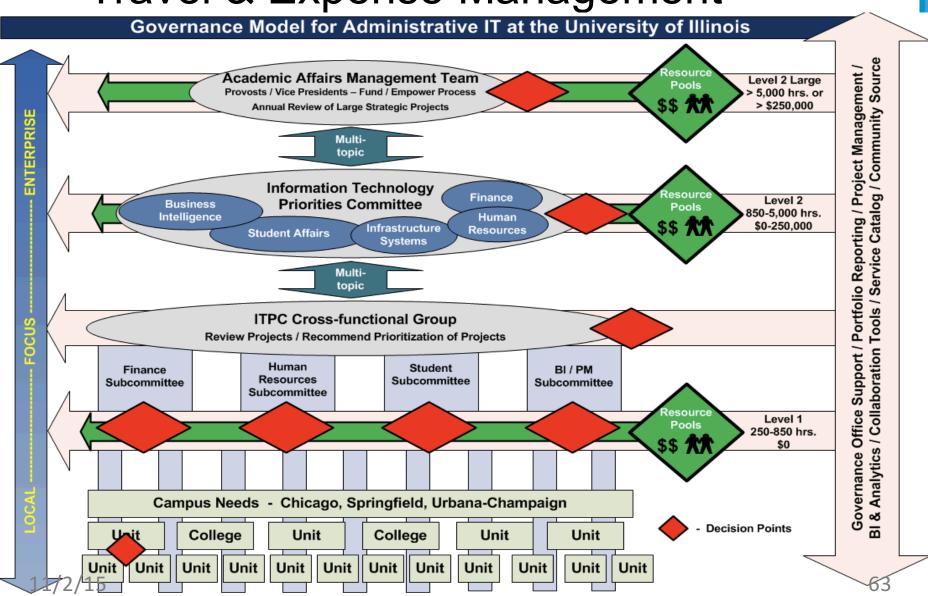
- L2 Project proposal completed
- Review at functional subcommittee
- *Reviewed at cross-functional and main ITG Group*
- REVIEW COMPLETE

Level 3 project
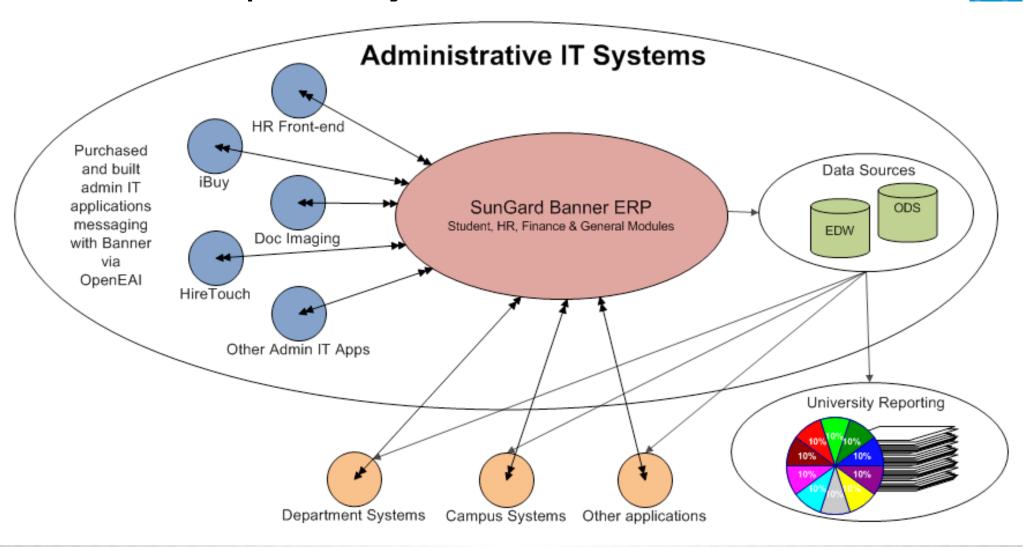
Travel & Expense Management

Review steps:

- L3 Project proposal completed
- Review at functional subcommittee
- Reviewed at cross-functional and main ITG Group
- *Executive Review*
- REVIEW COMPLETE

Complex Project Example - Travel & Expense Management

Governance Model for Administrative IT at the University of Illinois
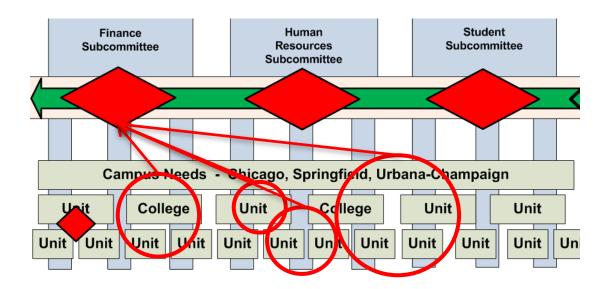
Complex Project Example - Enterprise System Structure

Complex Project Example - Travel & Expense Management
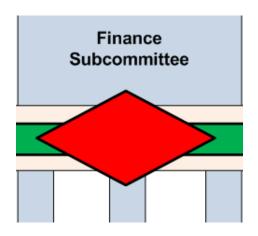
Multiple units across all campuses identify a need to improve travel and expense tracking and reimbursement.

Complex Project Example - Travel & Expense Management

A Project Proposal is created and moves to the Finance Subcommittee for review

Project Proposal Template – Level 2	ITPC-0258

To be completed for all requests that require more than 850 hours of effort or with project budgets greater than $100,000. Projects requesting $250,000 or more will require incremental AAMT funding or unit contribution to cost in excess of that amount.

1) **Project Name:** Travel and Expense Management System

Campuses affected by project (GC/UIC/UIUC/UIS/UA): All

Date Template Submitted to ITPC: Initial - February 2008
Re-submitted - December 2008

2) **Sponsor(s)**

Name: Phil XXXXXXX	Email: XXXX@uillinois.edu
Campus: UIUC	Department: Chief Procurement Office (CPO)
Name: Sandy XXXXXXX	Email: XXXXX@uillinois.edu
Campus: UIUC	Department: University Payables
Name: Jim XXXXX	Email: XXXXX@uillinois.edu
Campus: UIUC	Department: University Payables
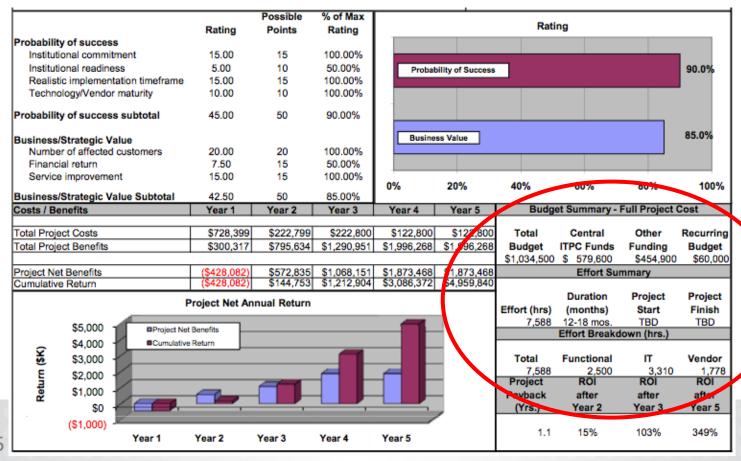
3) **Project Description**

a) **What is the business need to be addressed by this project?**

At the request of many university departments including OBFS, this project proposal is for the purchase and implementation of a Travel and Expense Management (T&EM) system at University of Illinois. A T&EM is a management tool that facilitates the entry, accumulation, processing and management of travel, entertainment, employee reimbursement, miscellaneous invoice payments and reconciliation of expenses.
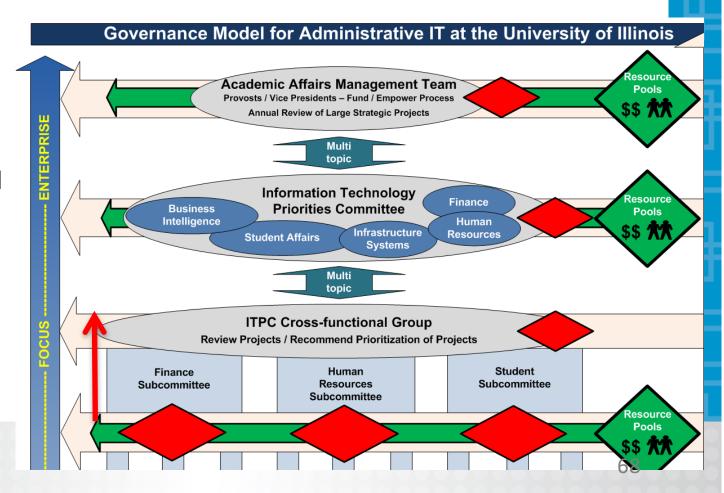
Automation of reimbursement and associated processes is a critical business practice for large organizations and universities. The ability to service employees via the web and allow them to complete expense reimbursement requests on-line is a cost effective means to service a distributed user pool and multi-campus university. Likewise, it is important to meet the needs of college/department units and payables staff to organize and manage reimbursement information.

Complex Project Example - Travel & Expense Management

Due to the size/scope of the proposal, the project will need to go through all levels of review.

Complex Project Example - Travel & Expense Management
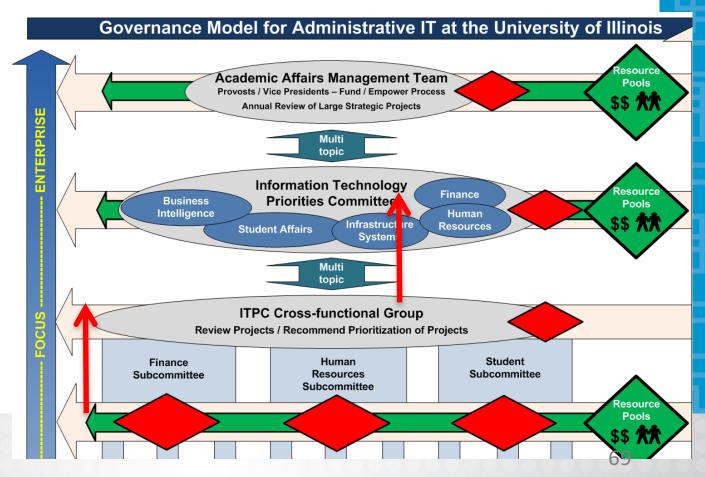
The proposal goes through a series of decision points – Finance Subcommittee Review

The **Finance Subcommittee approves** the project to proceed to cross-functional review for a recommendation for approval / denial and prioritization

Governance Model for Administrative IT at the University of Illinois

Complex Project Example - Travel & Expense Management
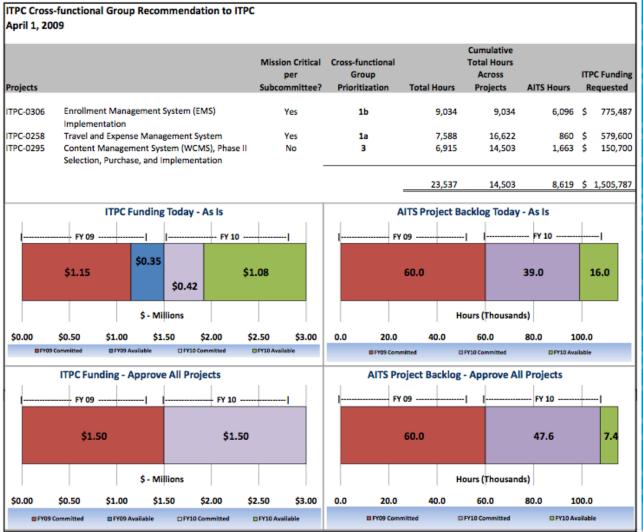
The proposal goes through a series of decision points – Cross-functional Group Review

The **Cross-functional group approves** the project to proceed to ITPC review for a recommendation for approval / denial and also **provides a prioritization recommendation**.

Governance Model for Administrative IT at the University of Illinois

Complex Project Example - Travel & Expense Management

Cross-functional Group provides its recommendation

In this case, the group recommends approval and also recommends it highly compared to the other proposals being reviewed

ITPC Cross-functional Group Recommendation to ITPC
April 1, 2009

Projects		Mission Critical per Subcommittee?	Cross-functional Group Prioritization	Total Hours	Cumulative Total Hours Across Projects	AITS Hours	ITPC Funding Requested
ITPC-0306	Enrollment Management System (EMS) Implementation	Yes	1b	9,034	9,034	6,096	$ 775,487
ITPC-0258	Travel and Expense Management System	Yes	1a	7,588	16,622	860	$ 579,600
ITPC-0295	Content Management System (WCMS), Phase II Selection, Purchase, and Implementation	No	3	6,915	14,503	1,663	$ 150,700
				23,537	14,503	8,619	$ 1,505,787

ITPC Funding Today - As Is
FY 09 — FY 10
$1.15 | $0.35 | $0.42 | $1.08
$ - Millions
$0.00 $0.50 $1.00 $1.50 $2.00 $2.50 $3.00
■FY09 Committed ■FY09 Available □FY10 Committed □FY10 Available

AITS Project Backlog Today - As Is
FY 09 — FY 10
60.0 | 39.0 | 16.0
Hours (Thousands)
0.0 20.0 40.0 60.0 80.0 100.0
■FY09 Committed □FY10 Committed □FY10 Available

ITPC Funding - Approve All Projects
FY 09 — FY 10
$1.50 | $1.50
$ - Millions
$0.00 $0.50 $1.00 $1.50 $2.00 $2.50 $3.00
■FY09 Committed ■FY09 Available □FY10 Committed □FY10 Available

AITS Project Backlog - Approve All Projects
FY 09 — FY 10
60.0 | 47.6 | 7.4
Hours (Thousands)
0.0 20.0 40.0 60.0 80.0 100.0
■FY09 Committed □FY10 Committed □FY10 Available

Complex Project Example - Travel & Expense Management

The proposal goes through a series of decision points – ITPC Review

The **ITPC approves the proposal and prioritizes it** for final review by AAMT.

Governance Model for Administrative IT at the University of Illinois

ENTERPRISE

FOCUS

Academic Affairs Management Team
Provosts / Vice Presidents – Fund / Empower Process
Annual Review of Large Strategic Projects

Resource Pools
$$

Multi topic

Information Technology Priorities Committee
Business Intelligence
Student Affairs
Infrastructure Systems
Finance
Human Resources

Resource Pools
$$

Multi topic

ITPC Cross-functional Group
Review Projects / Recommend Prioritization of Projects

Finance Subcommittee

Human Resources Subcommittee

Student Subcommittee

Resource Pools
$$

Complex Project Example - Travel & Expense Management

The proposal goes through a series of decision points – AAMT Review

- This is an annual request for project review and funding
- ITPC requests approval for all projects and also an additional $500K for administrative IT projects for the next fiscal year

Governance Model for Administrative IT at the University of Illinois

Academic Affairs Management Team
Provosts / Vice Presidents – Fund / Empower Process
Annual Review of Large Strategic Projects

Resource Pools
$$ 👥

Complex Project Example - Travel & Expense Management
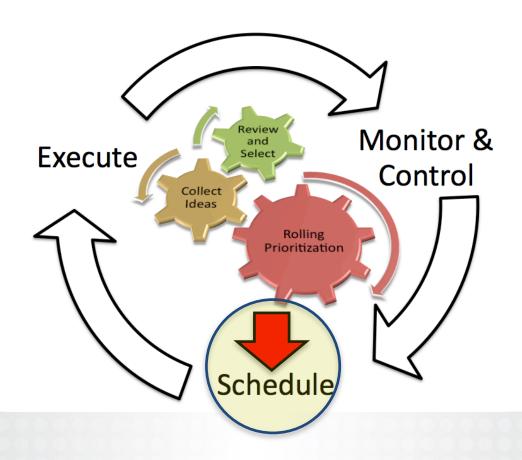
AAMT Decisions
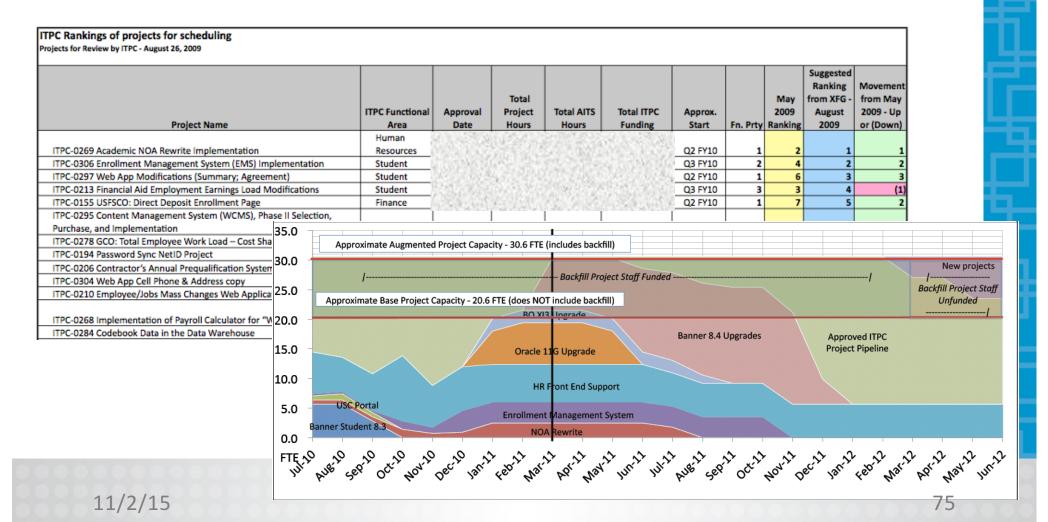
- Approval of Travel & Expense Management System
- Approval of Enrollment Management Suite
- Denial of Web Content Management System
- Denial of additional incremental $500K for next FY

Requested ITPC Funding for FY10				
		ITPC Recommedation		ITPC Recommendation w/ Existing Funding
ITPC Funded Items:				
Mandatory Project: FY10 component of ITPC-0300 Banner 8.1 Upgrade	$	71,774	$	71,774
Mandatory: Expected FY10 Upgrades/Regulatory Mandated Projects	$	313,286	$	313,286
ITPC-0258 Travel and Expense Management System	$	579,600	$	463,680
ITPC-0306 Enrollment Management Suite (EMS) Implementation	$	775,487	$	620,390
ITPC-0295 Web Content Management System (WCMS)	$	150,700	$	-
Other Project Funding for Small Operational Projects	$	109,153	$	30,870
Total FY 2010 Funding Request for ITPC Projects	$	2,000,000	$	1,500,000

Complex Project Example - Travel & Expense Management
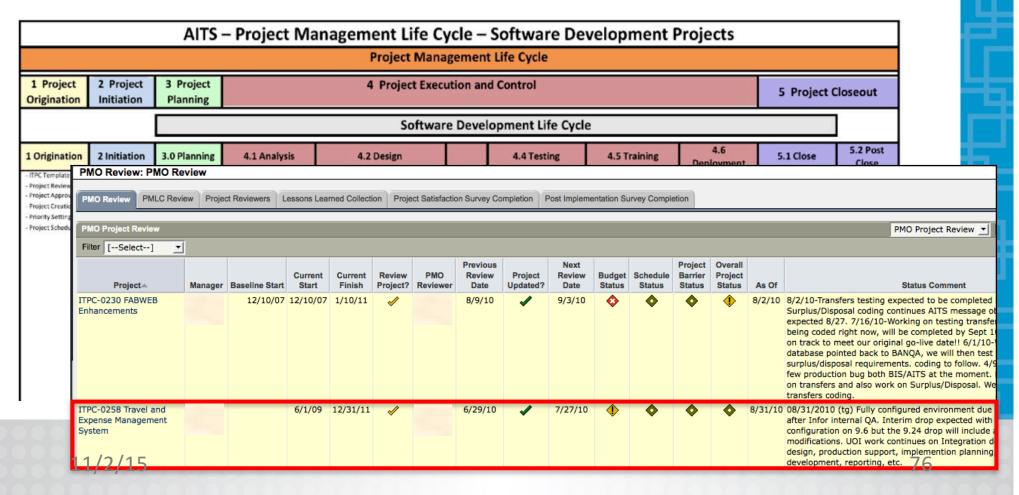
Final approval of project moves the project into the portfolio management process

Complex Project Example - Travel & Expense Management
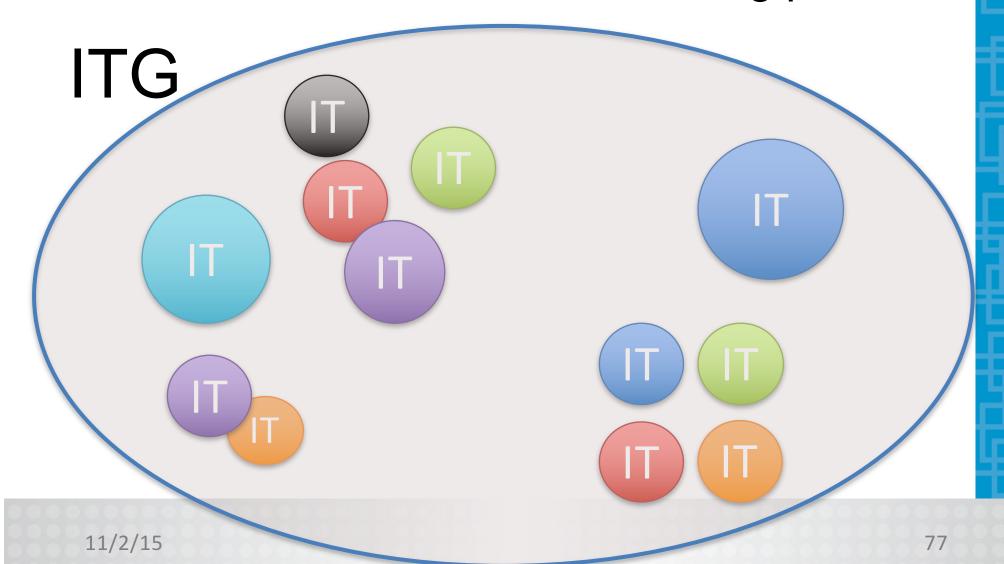
Schedule based on priority and resource capacity

ITPC Rankings of projects for scheduling
Projects for Review by ITPC - August 26, 2009

Project Name	ITPC Functional Area	Approval Date	Total Project Hours	Total AITS Hours	Total ITPC Funding	Approx. Start	Fn. Prty	May 2009 Ranking	Suggested Ranking from XFG - August 2009	Movement from May 2009 - Up or (Down)
ITPC-0269 Academic NOA Rewrite Implementation	Human Resources					Q2 FY10	1	2	1	1
ITPC-0306 Enrollment Management System (EMS) Implementation	Student					Q3 FY10	2	4	2	2
ITPC-0297 Web App Modifications (Summary; Agreement)	Student					Q2 FY10	1	6	3	3
ITPC-0213 Financial Aid Employment Earnings Load Modifications	Student					Q3 FY10	3	3	4	(1)
ITPC-0155 USFSCO: Direct Deposit Enrollment Page	Finance					Q2 FY10	1	7	5	2
ITPC-0295 Content Management System (WCMS), Phase II Selection, Purchase, and Implementation										
ITPC-0278 GCO: Total Employee Work Load – Cost Sha										
ITPC-0194 Password Sync NetID Project										
ITPC-0206 Contractor's Annual Prequalification System										
ITPC-0304 Web App Cell Phone & Address copy										
ITPC-0210 Employee/Jobs Mass Changes Web Applica										
ITPC-0268 Implementation of Payroll Calculator for "W										
ITPC-0284 Codebook Data in the Data Warehouse										

Complex Project Example -
Travel & Expense Management

Execute utilizing standards for project management
and system implementation; monitor and control

AITS – Project Management Life Cycle – Software Development Projects

76
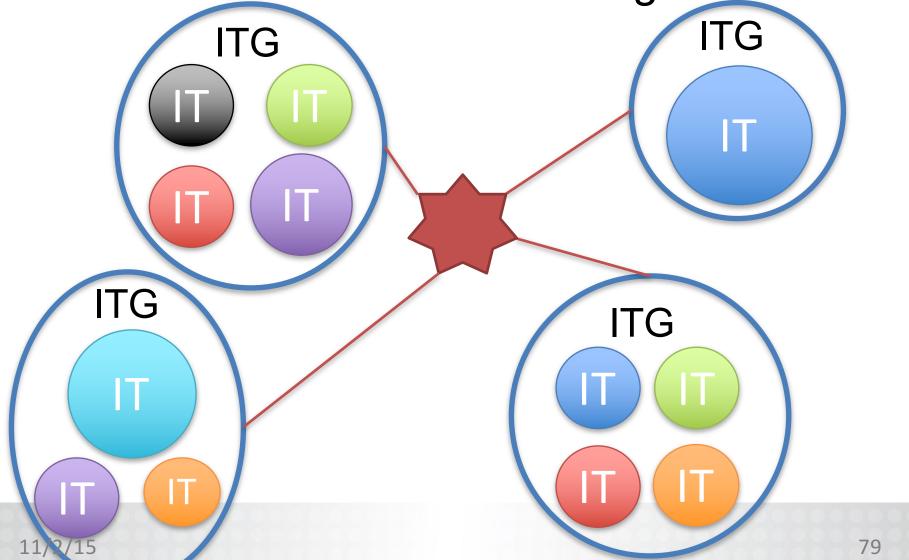
ITG Organization –
It all doesn't have to be one big process

ITG
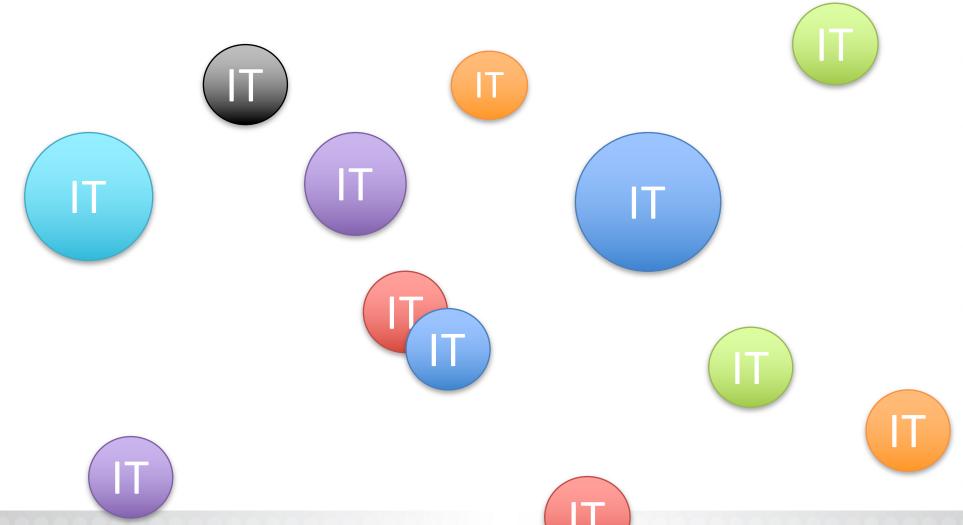
ITG Organization –
It may be several processes

ITG Organization –
Communication & interacting as needed

ITG Organization –
What's not workable is no process or chaos

ITG Maturity Levels

Level 0 – Non-Existent	• Management processes are not applied at all
Level 1 - Initial	• Processes are ad hoc and disorganized
Level 2 – Repeatable	• Processes follow a regular pattern
Level 3 – Defined	• Processes are documented and communicated
Level 4 - Managed	• Processes are monitored and measured
Level 5 – Optimized	• Best practices are followed and automated

http://www.itgi.org

Some Tips and Lessons Learned on ITG

Participants

- Do you have the right people involved at the right levels? Do these people have the right background and information to make thoughtful decisions?

- The leader(s) of the process and components need to have a vested interest in the success of the process or else results will be substandard.

- Must have a dedicated resource to manage the day to day operations and overall coordination of the process.

Some Tips and Lessons Learned on ITG

Process

- Focus more time evaluating the business issues and less time on the technology.

- Be prepared to make hard decisions and work within the constraints of your resources.

- Push down smaller decisions for efficiency and let executives focus on the projects with high costs and impact.

- Actively align towards the business strategies of the institution – this won't happen on its own.

Some Tips and Lessons Learned on ITG

Process

- Know resource capacity and demand in order to provide a context for making decisions. Don't forget to account for non-discretionary projects (upgrades) and incremental maintenance growth levels as these take away capacity for discretionary projects.

- Periodically revaluate the process and adjust as necessary.

Group Interactive Activity

•

Designing IT Governance

ITG Components – Building Blocks for Model

Focus

- **Purpose and Scope:** What is it that needs to be governed? What are your institutional priorities?

- **Participants:** Who should participate? Who should advise and who should make decisions? What are the key roles to identify? How are they interconnected?

- **Decision-making:** What decisions are made at the different levels/groups? What resources will be allocated via the process?

- **Structure:** What are the layers to the governance structure? How are they interconnected?

- **Communication and Coordination:** Who will work behind the scenes to facilitate the process?

Group Activity 2 – DESIGN ITG

Design an IT Governance model for your institution. Answer key questions at the right level of complexity to meet your needs:

- What do you want to govern?

- Who should be involved?

- What and where will decisions occur in the ITG process? What resources will be allocated via the process?

- How is the process/group(s) structured?

- How will you manage the ITG process?

Build an IT Governance Model
Group Interactive Activities

- Walk through defining the components for an ITG structure you are interested in building (15 minutes)

- Work with colleagues to discuss your experiences, challenges, and successes with ITG (15 minutes)

Group Activity Wrap-up

Discussion and Q&A

15 MINUTE BREAK
2:15 – 2:30 pm

Implementing Portfolio and Project Management

Topics
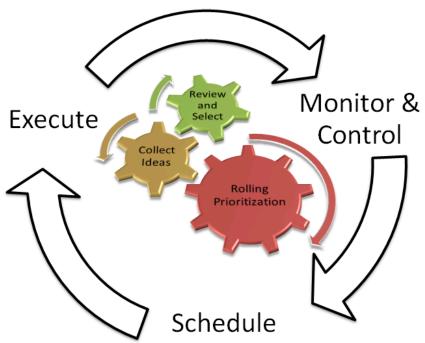
- Brief overview of portfolio management
- Implementing / improving a PPMO, a step by step guide
  - Define work | Manage portfolio | Introduce project management | Establish systems and tools
  - Exercise

Portfolio management

- A portfolio is a collection of projects that is grouped together to facilitate effective management of that work in order to meet strategic business objectives.

- Main activities for a portfolio manager/ or portfolio management office
  - Facilitating project selection and prioritization
  - Scheduling and resource management
  - Monitoring and controlling the portfolio
  - Providing project management standards and guidance

How it can help

- Provides clear set of priorities for approved projects
- Provides a manageable workload for project resources
- Answers the questions: What are we working on and are they the right things?

Execute

Review and Select

Collect Ideas

Rolling Prioritization

Monitor & Control

Schedule

+project management center of excellence

Portfolio management goals

Improve performance

Improve performance, provide support

Center of excellence for PM

Facilitate ITG

Facilitate governance

Communicate priorities

Report on performance

Manage performance

Monitor and control portfolio

Resource management and scheduling

Manage expectations; justify staffing

Manage workload; schedule work

Models for portfolio and project management
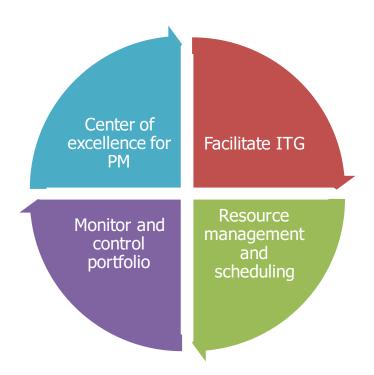
All PPMO's require a portfolio manager to do these things.
Some variation exists in how this is staffed and tasks

Variations exist in the amount of control exercised over projects and how PM roles are staffed

Center of excellence for PM

Monitor and control portfolio

Facilitate ITG

Resource management and scheduling

Variations

Center of excellence for PM

Facilitate ITG

Monitor and control portfolio

Resource management and scheduling

- Supportive: Methodology, standards, projects run by technical leads and analysts

- Controlling: Enforces standards, performs reviews, projects run by PMs within the PMO and other folks

- Directive: PMs from the PMO run the projects.

- Optional service provider: Master planner and project initiation services provided upon request or as required

From 0 to PPM

- Step by step guide to implementing PPM
- Work | Portfolio | Projects | Systems

From 0 to PPM

Work
- Effort
- Project inventory
- Ownership
- Time reporting

Portfolio
- Project proposal and approval
- Reporting and Review
- Scheduling and prioritization

Projects
- Select the PMO model
- Develop standards
- Increase PM skillset
- Quality control

Systems
- Collaboration
- Portfolio and project management
- Time tracking and reporting
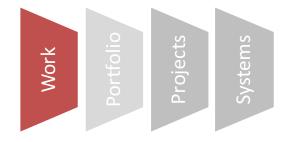
Categorize effort

- Identify all the types of work done in your organization
- Define high-level categories
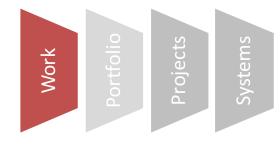
Project Definition
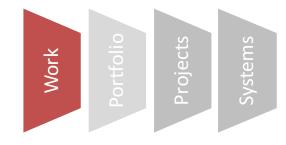
■ PMBOK Definition: A temporary endeavor undertaken to create a unique product, service or result.

  ■ Definite beginning and end

  ■ Clear objectives

  ■ Not an ongoing effort

  ■ Produces something new and unique

    ■ Product, service, or result

Project Definitions

- Work Requests
  - Total budget: < $20K | Hours of effort: < 250
- Projects
  - Level 1
    - Total budget: < $100K | Hours of effort: < 850
  - Level 2
    - Total budget: < $250K | Hours of effort: < 5,000
  - Level 3
    - Total budget: > $250K | Hours of effort: > 5,000

Work | Portfolio | Projects | Systems

Project Fields

- Projects come in many flavors
- Identify categories and values that will be used to stratify data when reported

Mandatory Project	Functional Area	Project Type	Goal
• Yes	• Finance	• Analysis	• Strategic Initiative
• No	• HR	• Application Development	• Cost Savings
	• Student	• Enhancement	• Internal Labor Efficiency
	• BI	• Upgrade	• Improve Customer Service
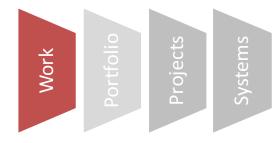
- Identify basic project status data: name, id, PM, dates, level of effort, status comment, etc.

Inventory
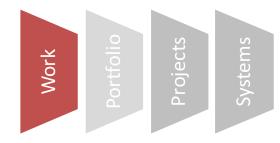
- After defining a project and the initial set of fields to be used, conduct the interview

- Gather list of work from each area

- Identify which are projects

- Then review list with the organization to identify any missing items

Assign ownership

- Assign PMs to the identified projects

- Institute simple status reporting guidelines and cycle: Start date, end date, status comment, etc

- Set expectation from upper management for reporting on projects

Time Reporting

Work | Portfolio | Projects | Systems

- Record effort expended to make assessments of
  - Resource Availability
  - Project health
  - Scheduling of new work
  - Staffing levels
- Difficult to institute, but worth it.
- Alternative to individual time reporting: monthly manager estimate of how their staff spend their time

Portfolio

Work
- Effort
- Project inventory
- Ownership
- Time reporting

Portfolio
- Project proposal and approval
- Reporting and Review
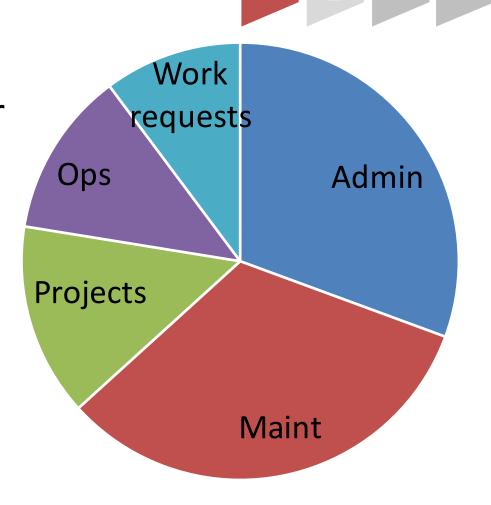- Scheduling and prioritization

Projects
- Select the PMO model
- Develop standards
- Increase PM skillset
- Quality control

Systems
- Collaboration
- Portfolio and project management
- Time tracking and reporting

Project proposal / review

Work | Portfolio | Projects | Systems

- Work with ITG group to:
  - Establish proposal template
  - Establish clear process for submitting the proposal
  - Establish proposal review groups and regular review schedules
  - Establish criteria and rules for review and acceptance
- Develop standard reporting package and tools for each review
- Determine where to store and how to communicate results

Examples in supplemental materials

Reporting

Work | Portfolio | Projects | Systems

- Set up regular reporting cycles early on
- Show value quickly
- Enhance it as you go
- Enforces conformance to status reporting guidelines
- Wide distribution
- Will be simple at first
- Set expectation that this is the system of record
- Standing agenda item

Examples in supplemental materials

Simple reports at first

Project ID and name	Project manager	Level of effort (low, medium, high)	Date Started	Anticipated End Date	Status as of	Status comment

Project ID and name	Approval Date	Priority	Description	Anticipated start date

Prioritization / scheduling

Work · Portfolio · Projects · Systems

- Work with ITG to establish prioritization process
  - Occurs regularly for all non-started, approved projects
  - Survey method works well
  - Discuss and adjust results at meeting
- Communicate priorities to resource managers
- Establish regular review cycle with resource managers for reviewing priorities and scheduling projects
- Establish tools and reports for recording and communicating schedule information

Examples in supplemental materials

Projects

Work

- Effort
- Project inventory
- Ownership
- Time reporting

Portfolio

- Project proposal and approval
- Reporting and Review
- Scheduling and prioritization

Projects

- Select the PMO model
- Develop standards
- Increase PM skillset
- Quality control

Systems

- Collaboration
- Portfolio and project management
- Time tracking and reporting
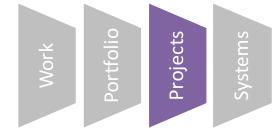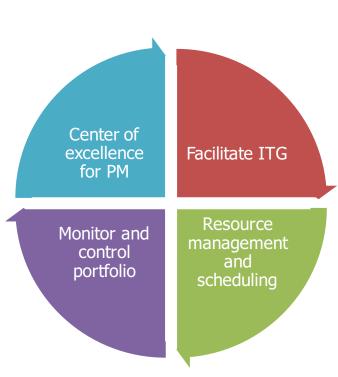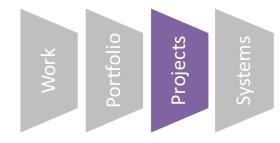
Select the PMO model

- **Supportive:** Methodology, standards, projects run by technical leads and analysts
- **Controlling:** Enforces standards, performs reviews, projects run by PMs within the PMO and other folks
- **Directive:** PMs from the PMO run the projects.

Factors
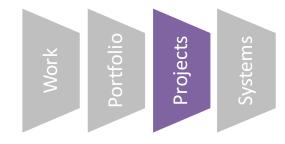
- Staffing options: dedicated staff, virtual team, part time staff
- Executive support
- Culture
- Evaluate organizational pain points—major failed project, chaotic portfolio, overwhelmed staff, or lots of projects with nothing complete
- Identify starting state and end state

Develop standards

Work | Portfolio | Projects | Systems

- Best if designed by the group
- The lighter the better; provide options for complexity
- Use PMI or another organization as a starting point
- PM methodologies are pretty much the same, don't sweat the changes or pursue an ideal—let the group own it.
- The important part is the process of developing it as a group

Standards: PM Toolkit

Project Management Toolkit

This site outlines a shared project management methodology for the central IT organizations of the

Recommended project artifacts by phase

The following artifacts are recommended or required for each project management phase.

Project phase	Required	Highly recommended
Originating	**Project proposal:** A project proposal includes: description of the work, business case, alternatives considered, impact of not doing the work, initial estimate of resources and schedule, and strategic match. A project proposal starter template is available on this site.	
Initiating	**Project charter:** The project charter acts to define a number of key project elements including a project description, scope definition, and role/responsibility definition. A project charter starter template is available on this site.	**Kickoff presentation:** A PowerPoint presentation that can be used to review the main sections of the project charter and communication plan during the kickoff meeting. A starter kickoff presentation template is available. **Team roles description:** A description of typical roles on a project team that can be customized for a specific project. A sample role description document is available.
Planning	**Communication plan:** The Project Communication plan is created by the project team early in project to indicate their agreement on how the team will communicate important information during the project - status, meetings, issues, deliverables access, and design/document reviews. It is recommended that this plan is completed early enough to be included for review at the Project Kick-off Meeting. A starter communication plan is available on this site. **WBS and project schedule:** A Work Breakdown Structure, or WBS, is a hierarchical organization of high level activities that must be done to complete the work of the project. The project schedule	**Project stakeholder analysis worksheet:** A worksheet to be used by the project manager to ensure all important stakeholders as assessed prior to completing the communication plan. This document should not be distributed. A worksheet is available on this site. **High level requirements:** Please consult with your PM Lead or PMO for your organization's requirements document

Portfolio & Project Management Office

Project Management Toolkit

Origination

Initiation

Planning

Executing, Monitoring, and Controlling

Closing

Recommended project artifacts by phase

Project definition recommendations

Program Management Toolkit

Contact Us

Examples in supplemental materials

Standards: SDLC

AITS – Project Management Life Cycle – Software Development Projects

Project Management Life Cycle

1 Project Origination	2 Project Initiation	3 Project Planning	4 Project Execution and Control	5 Project Closeout

Software Development Life Cycle

1 Origination	2 Initiation	3.0 Planning	4.1 Analysis	4.2 Design		4.4 Testing	4.5 Training	4.6 Deployment	5.1 Close	5.2 Post Close
- ITPC Template - Project Review - Project Approval - Project Creation - Priority Setting - Project Scheduling	-Discovery meetings -Stakeholder analysis - Communication plan - Project Charter - Project Kick Off -Communication activities	- Project Plan in Clarity (WBS, Resources, Estimates, and Schedule) - Project planning meetings with team - PMO / SMT Sign-Off -Final project plan review and approval with team -Baseline project - Deployment Plan	- Business Rules - DWG Design Collaboration - Application Design - Integration Design - Conversion Strategy - EAC Review - Security Review - Application Design Review - Training Strategy - Testing Strategy – Communicate -Monitor, Control, and Manage Change	- DWG Design Collaboration - Style Guides - Service Guides - Technical Design - EAC Review - Security Review - Sensitive Data Usage Form	- Technical Design Review - QA Master Test Plan - Training Plan - Hardware / Software Order Communicate -Monitor and Control - Manage Change Requests	- Technical Design Review - QA Master Test Plan - Training Plan - Hardware / Software Order Communicate -Monitor and Control - Manage Change Requests - IITAA Checklist	- Training Environment - Artifact Staging - Training Security Setup - Customer Training -Communicate -Monitor, Control, and Manage Change	- Application Deployment Checklist - Artifact Staging - Dress Rehearsal - Change Control - Event Notice - System Deployment - Production Readiness Test - Go / No Go Decision - Communicate -Monitor, Control, and Manage Change	- Post Deployment Review - Environment Review and Cleanup - Stakeholder Satisfaction Survey - Post Project Review - Final Project Documentation Review - Short Term Post Project Support - Production Support	- Post Project Survey

4.3 Construction

- EAC Review
- Development
- System Test Plan
- Functional Test
- QA Test Cases / Scripts
- QA Functional Test
- Performance Test Plan
- Performance Test
- Security Scans
- Customer Test Plan
- Alpha Test
- Training Materials
- User Guides / Help Materials
- Communicate
-Monitor and Control
 Manage Change Requests
- Hardware / Software Installation
- Infrastructure Deployment
- Development / Unit Test Cycle
- Show and Tell
- DWG Design
- Code Review
- Defect Management

Participants

1 Origination	2 Initiation	3.0 Planning	4.1 Analysis	4.2 Design / 4.3 Construction	4.4 Testing	4.5 Training	4.6 Deployment	5.1 Close	5.2 Post Close
- AAMT - ADSD Managers - Architecture - COE Managers - EAC - ITPC - ITPC Subcommittees - PMO - Project Sponsor - SMT - UA Technology Organizations	- AFM - Analyst - Architecture - Customer - Deployment - Development - Operations - PMO - Project Manager - Project Sponsor - Quality Assurance - Security - UA Technology Orgs	- Analyst - Architecture - Customer - Deployment - Development - Operations - PMO - Project Manager - Project Sponsor - Quality Assurance - Security - SMT - Technical Lead	- Analyst - Architecture - Customer - Deployment - Development - Development Working Group - Operations - Project Manager - Project Sponsor - Quality Assurance - Security - Training Team	- Analyst - Architecture - Customer - Deployment - Development - Development Working Group - Operations - Project Manager - Project Sponsor - Quality Assurance - Security - Training Team	- Analyst - Customer - **Deployment** - **Development** - **Project Manager** - **Security**	- Analyst - Customer - Deployment - Development - Operations - Project Manager - Project Sponsor - Quality Assurance - Security	- Analyst - Architecture - Customer - Deployment - Development - Operations - PMO - Project Manager - Project Sponsor - Project Team - Quality Assurance - Security	- Customer - PMO - Project Manager - Project Sponsor	

Build the PMO

- Like minded folks maintain and use the methods

- Offer training and professional development

- Define PM responsibilities

- Consulting/planning services for projects

- Actively build culture

- Staffing:
    - Select folks with discipline over personality
    - Build/grow PMs where possible
    - Don't be bamboozled by PMI-speak or PMP credentials

Work | Portfolio | Projects | Systems

Increase PM Skillset

- Training
- Coaching
- Reviews
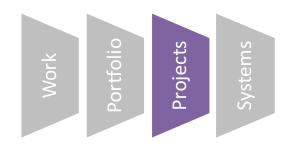- Audits and close supervision
- Culture
- Job aids and checklists
- Don't overwhelm folks
- Talking points for hard conversations
- Core people invested

Quality control

Work Portfolio Projects Systems

- PMO Reviews
- Checklists
- Focus on one area at a time
- Enlist PMs to serve as Quality Control person
- Make sure folks are aware of how the data is used and how important it is
- Audits

Project review Checklists

PMO Project Review and Clarity Guidelines

Types of Projects

Projects are requested as an ITPC, AITS or PPMO project.

ITPC--typically initiated by a customer and provides a product or service directly to the customer.

AITS internal--typically initiated within AITS, provides improvements to our infrastructure in support of our services to the customer.

ITPC and AITS can be any of these types:

- Analysis: Projects that require a large amount of analysis before a project can be requested.
- Application Development: Creation of a new application in house.
- Enhancement: Projects that increase functionality to existing software.
- Integration and Interfaces: These are new feeds to Banner that are small in nature with a large impact.
- Maintenance: These are projects that are used for tracking time for ongoing maintenance on high profile applications.
- Upgrades: Any upgrade to an in-house application or vended application is categorized as an upgrade project.
- Business Intelligence/Reporting: Decision Support projects for creating reports or a business intelligence solution for users.
- Vended Application: Installation of a software product that is produced and supported by a vendor.

Project Review Requirements

All Projects are required to have the following fields or processes:

- Must follow PMLC
- Must be Baselined
- Performance Indicators set and updated
- Lessons learned surveys – unless approval for no survey by Cynthia or Kelly
- Must have a project charter and a communication plan. These are to be uploaded on the PMO Reviewer page under General.
- Must have tasks following the template for the Initiation, Planning, and Closing WBS structure. Customization of the Execution section is allowed but must have a good reason as to why it is not following the template structure.

PMO Reviewer Full Checklist

Tab/Page	Clarity Field/Process	PMO	PM
Project Summary Page	☐ Start Date	X	
Project Summary Page	☐ Finish Date	X	
Project Summary Page	☐ Progress	X	
Project Summary Page	☐ Requested Implementation Date *(not required for Analysis and Maintenance Projects)*	X	
Project Summary Page	☐ Current Implementation Date *(not required for Analysis and Maintenance Projects)*	X	
Project Summary Page	☐ Stage	X	
Project Summary Page	☐ Document Location *(Optional)*	X	
Project Summary Page	☐ As Of Date		X
Project Summary Page	☐ Status Comment Make sure the status comment is professional with complete sentences.		X
Team Tab	☐ All generic roles have been replaced or removed	X	X
Task Tab	☐ Open tasks do not have a finish date in the past	X	X
Task Tab	☐ Tasks with start dates in the past but that have not actually started can still be completed on time.	X	X
Task Tab	☐ Tasks that are complete must be marked closed, ETC's set to zero, 100% complete, and Open for Time Entry is unchecked	X	X
Task Tab	☐ ETCs and resource assignments have been updated for remaining work on tasks	X	X
Task Tab	☐ Tasks that will be starting soon have the correct resources assigned to them and they are open for time entry	X	X
Risks/Issues/Changes Tab	☐ Check with the PM that risks and issues have been logged and assigned in Clarity	X	X
Baseline Page	☐ Ensure that the project has been baselined	X	

Systems

Work
- Effort
- Project inventory
- Ownership
- Time reporting

Portfolio
- Project proposal and approval
- Reporting and Review
- Scheduling and prioritization

Projects
- Select the PMO model
- Develop standards
- Increase PM skillset
- Quality control

Systems
- Collaboration
- Portfolio and project management
- Time tracking and reporting

Work Portfolio Projects Systems
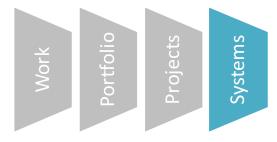
Systems
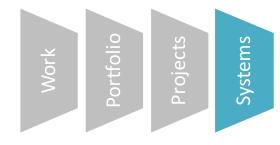
- The technology that is used should implement the processes you have developed.
    - Your processes should not be built around the technology
- Utilizing technology will greatly improve your ability to keep the data current and get meaningful reports from the system you use.
- MS Project Server, Clarity, and Planview are well-rated systems

System of Record
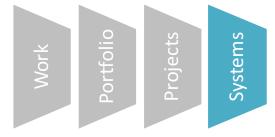
- In order to make good decisions, you need to have good data

- To have good data, you need to have an authoritative source for you data

- We recommend one system for PPM and another system for team collaboration

PPM
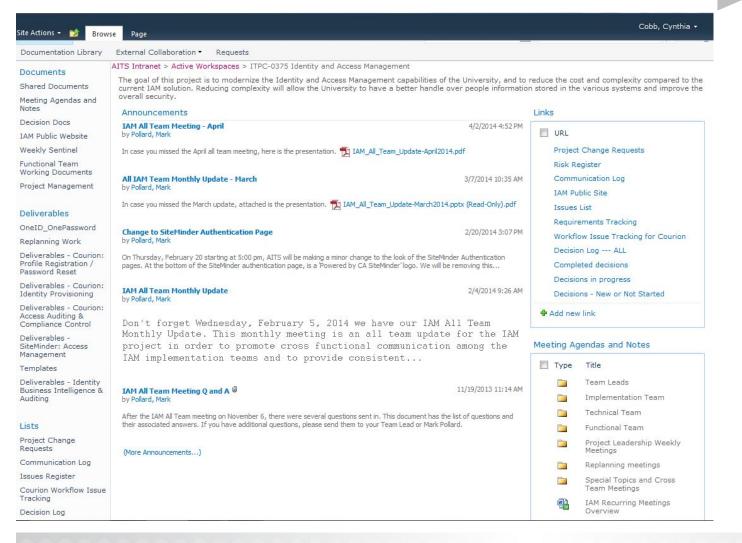
- Application that allows project managers to plan, monitor, and update the project status over time

- More than a project management tool: rolls up to a portfolio view:
  - CA Clarity
  - Planview
  - MS Project Server

- Must track the items you identified as required for each project.
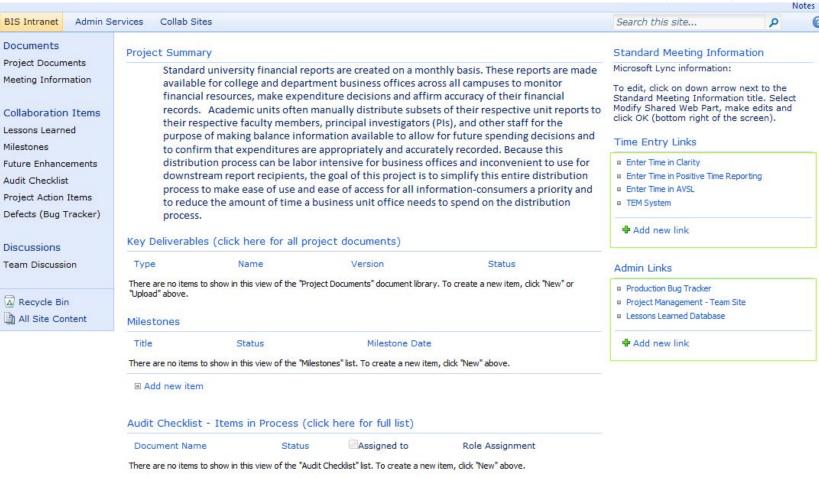
Collaboration System

- The project artifacts are best kept in a place that allows for easily creating, updating, and sharing them with the team.

- SharePoint is an excellent choice for this

- Can set up a standard template for projects that have all the standard PM artifacts. Can be used to enforce the process.

Collaboration space

Collaboration space

Notes

BIS Intranet   Admin Services   Collab Sites   Search this site...

Documents
Project Documents
Meeting Information

Collaboration Items
Lessons Learned
Milestones
Future Enhancements
Audit Checklist
Project Action Items
Defects (Bug Tracker)

Discussions
Team Discussion

Recycle Bin
All Site Content

Project Summary

Standard university financial reports are created on a monthly basis. These reports are made available for college and department business offices across all campuses to monitor financial resources, make expenditure decisions and affirm accuracy of their financial records. Academic units often manually distribute subsets of their respective unit reports to their respective faculty members, principal investigators (PIs), and other staff for the purpose of making balance information available to allow for future spending decisions and to confirm that expenditures are appropriately and accurately recorded. Because this distribution process can be labor intensive for business offices and inconvenient to use for downstream report recipients, the goal of this project is to simplify this entire distribution process to make ease of use and ease of access for all information-consumers a priority and to reduce the amount of time a business unit office needs to spend on the distribution process.

Key Deliverables (click here for all project documents)

Type	Name	Version	Status

There are no items to show in this view of the "Project Documents" document library. To create a new item, click "New" or "Upload" above.

Milestones

Title	Status	Milestone Date

There are no items to show in this view of the "Milestones" list. To create a new item, click "New" above.

⊞ Add new item

Audit Checklist - Items in Process (click here for full list)

Document Name	Status	Assigned to	Role Assignment

There are no items to show in this view of the "Audit Checklist" list. To create a new item, click "New" above.

Standard Meeting Information
Microsoft Lync information:

To edit, click on down arrow next to the Standard Meeting Information title. Select Modify Shared Web Part, make edits and click OK (bottom right of the screen).

Time Entry Links

- Enter Time in Clarity
- Enter Time in Positive Time Reporting
- Enter Time in AVSL
- TEM System

➕ Add new link

Admin Links

- Production Bug Tracker
- Project Management - Team Site
- Lessons Learned Database

➕ Add new link

Group Interactive Activity:

Design your PMO and plan next steps

Design your PMO

PMO Design Worksheet

Please select options listed, include notes or customizations where needed

Facilitate ITG	This is required			
Resource management and scheduling	Scheduling and resource management performed by committee of resource managers	Scheduling and resource management done centrally by PMO		
Monitor and control portfolio	Project status reporting	Project health monitoring	Stage gate processes and active management of portfolio	
Center of excellence for project management	Recommended methodology and tools.	Project managers run projects using required methodology and tools.	PMO trained project managers run projects using required methodology and tools. PMO provides reviews	P... m... projects using standard methodology and tools.
Optional service model	Planning, initiating, closing, and lessons learned services provided by central PMO upon request.			

Center of excellence for PM

Facilitate ITG

Monitor and control portfolio

Resource management and scheduling

Plan your implementation

Work | **Portfolio** | **Projects** | **Systems**

PPM Implementation Planning Worksheet

| Applicable? Y/N	Activity	Actions/Barriers			
	Work: Categorize effort				
	Work: Define what qualifies as a project				
	Work: Identify project attributes				
	Work: Inventory projects				
	Work: Assign ownership / project managers for projects				
	Work: Institute and roll out time reporting processes/tools				
	Portfolio: Establish proposal template				
	Portfolio: Establish submission process				
	Portfolio: Establish review process and schedules				
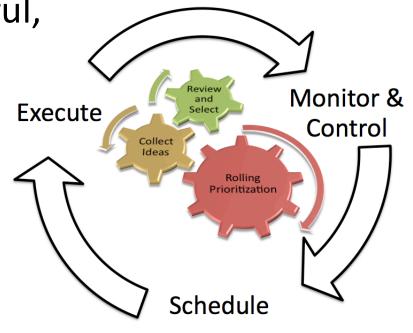
Governance, Portfolio and Project Management (GPPM)

In order to be most successful, you need all of the pieces.

- IT Governance
- Portfolio Management
- Project Management

+project management center of excellence

Questions and Discussion

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Thank you for participating in today's session.

We're very interested in your feedback. Please take a minute to fill out the session evaluation found within the conference mobile app, or the online agenda.