Do More...with Project Management
What is Project Management?

- Project - activity designed to produce a unique product, service or result, with a defined start and end time.
- Project Management - application of knowledge, skills and techniques to execute projects effectively and efficiently
  - Strategic competency enables you to tie project results to business goals
- GOAL TODAY – Help you become more efficient!
Agenda

- Measure your project management abilities
- Project Management Maturity Levels (based on work by Gartner)
- Examples from our organizations
- Interactive Solution Session
- Wrap-Up
Presenters Today

- Louise Finn, Loyola University Maryland  
  CIO and Assistant VP Technology Services

- Dana German, University of Virginia  
  Project Manager, Information Technology Services

- Joy Hatch, Virginia Community College System  
  Vice Chancellor, Technology

- Sherri Yerk-Zwickl, Lehigh University  
  Director of Project Management and Web & Mobile Services
What is your Project Management IQ?

Level 1
Reactive
- More reactive than proactive
- PPM non-existent or just emerging
- PM Processes applied only to “major” projects
- Mad scramble to get things done
- No technology tool

Level 2
Emerging Discipline
- PMO created
- Importance of PM is understood by all
- PM used for all projects, not just major ones
- PM roles defined
- Use prioritization / approval processes
- Some technology

Level 3
Initial Integration
- Think holistically, focus on the whole, not the parts
- Focus on managing related projects
- Formalized roles for portfolio / program management
- Well defined career paths for PM’s
- PM systems in place

Level 4
Effective Integration
- Network of program managers available
- Program manager role well developed / different from PM
- Focus on being project-capable
- More customer-centric perspective
- Value and benefits are tracked

Level 5
Effective Innovation
- Fully integrated PM with ITIL change management
- Innovation is a continuous process everywhere
- Technology supports a robust knowledge management system
- Maximize odds of getting things right

High Performing
Customer Centric Perspective
Focus on Managing Related Projects
Operational Process Changes Happening
“Anything Goes – Just Get it Done”
ARE YOU HAPPY WITH THE PROJECT MANAGEMENT AT YOUR INSTITUTION TODAY?

Text a KEYWORD to 37607
Maturity Levels

<table>
<thead>
<tr>
<th>Level 1</th>
<th>Level 2</th>
<th>Level 3</th>
<th>Level 4</th>
<th>Level 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reactive</td>
<td>Emerging Discipline</td>
<td>Initial Integration</td>
<td>Effective Integration</td>
<td>Effective Innovation</td>
</tr>
</tbody>
</table>

- All internal processes are centered on the management of critical projects.
- Project processes are standardized.
- Specialized PPM leader roles are formalized.
- Cross-functional groups are easily formed, and collaboration is the norm.
- Centers of competency improve workload management.
- The portfolio is modeled and appropriately optimized, factoring in risk.
- Change operations provide a constant stream of mini-projects.

- Projects have budgetary estimates.
- PMO(s) are established.
- Projects are aligned with strategy.
- Programs increasingly are managed in-house.
- Benefit realization is being tracked.
- Multiple methods exist and are used by all PMs.
- Rapid strategy execution is the focus of enterprise programs.
- Change management and communications are core capabilities of the EPMO.

Gartner
Our Stories

DISCLAIMER – We are not experts, but we want to share our experiences with you!
Louise A. Finn
Chief Information Officer
Associate VP Technology Services
About Loyola

Established 1852
Liberal Arts, Catholic, Jesuit
Three campuses in Baltimore metro area
Total FTE – 5027 with 84% of undergrad pop. residential
Three schools: Arts and Sciences, Education, Business
Significant travel abroad program (Junior year)
First online program launched this fall

Technology @ Loyola
Centralized
Budget = $ 12.5m
Staff = 70 (last reorg 2009)
CIO = 6 years
PMO = 3 years (3.5 FTE)
Colleague, Moodle,
SharePoint, Exchange...
In the beginning...

- Spreadsheet for tracking names of projects > 100 in flight
- Gartner PPM Maturity Level .5
- Hired a consultant
- Established the PMO in 2009 (departmental reorg)
- Established a lite weight methodology that was built upon PMI
  - Project proposals submitted by anyone
  - Investigation by IT
    - ROM Estimates (effort & cost)
    - Advocate pitched to Governance
    - We never said “NO”
- One portfolio aligned with the semesters (3 per year)
- Still lots of confusion - Changing culture was hard
- Everyone afraid of the “end-run”
Years 2-3

- 2 Staff
- Gartner PPM Maturity Level 2
- Adopted portfolio management tool
- PMO Website
  - Project submission forms and tracking
- Scorecard (impact & risk)
  - Assigned a classification and swim lane
- Portfolios aligned with semesters (3 per year)
- Governance fully engaged
  - Monthly status reports
  - Scored projects
- SharePoint Team Site for each project
Project Classification (Prioritization)

- Projects are scheduled
  - Class X – Regulatory
  - Class 0 – Underway
  - **Class 1** – High Impact / Low Cost = Quick Win
  - **Class 2** – High Impact / High Cost = Large Strategic
  - **Class 3** – Low Impact / Low Cost = Nice to Have
  - **Class 4** – Low Impact / High Cost = Declined
Swim Lane (Required Level of Management)

**SWIM LANE 1**
- Charter
- Scope Statement
- Schedule
- Project Team Site
- Bi-Weekly Project Progress/Status Updates
- Populated Risk, and Issue Register
- Agendas for all Project/Sponsor Meetings
- Minutes for all Project/Sponsor Meetings
- Monthly Sponsor Team Meetings

**SWIM LANE 2**
- Charter
- Scope Statement
- Schedule
- Project Team Site
- Bi-Weekly Project Progress/Status Updates
- Populated Risk, and Issue Register
- Agendas for all Project Meetings
- Minutes for all Project Meetings
- Bi-Weekly Project Team Meetings (or more)

**SWIM LANE 3**
- Charter
- Schedule
- Project Team Site
- Bi-Weekly Project Progress/Status Updates
- Agendas for all Project Meetings
- Minutes for all Project Meetings

**SWIM LANE 4**
- Charter
- Schedule
- Project Team Site
- Bi-Weekly Project Progress/Status Updates
4 Years In...

- 3.5 Staff (3 PMPs)
- Gartner PPM Maturity Level 3.5 (scored 174)
- PM Partners
- Project Audits
- Multiple departments using our methodology & PPM Tool
  - Project submission forms
  - Unique scorecards
- Aligned with budget cycle and institutional priorities
- Master Gantt Charts for IT
- Change Advisory Board
  - Mid-cycle project requests
  - Schedule/Resource changes
- PM-Post IT Newsletter
- Lessons Learned and Project Satisfaction Survey
- Multiple governance bodies participating
Project Status Updates

University Projects

Strategic Reporting and Business Intelligence
Status: 1/1/12
End Date: TBD
Project Manager: Bin Wu
Advocate(s)/Sponsor(s): Randy Gentry
Status: The project is in its implementation phase with the department of Advancement, Institutional Research, Payroll, Financial Aid, and Controller Office. Graduation implementation is complete. The kick-off with SAS and R to occur soon. The following offices have been identified to be in scope with this project: CA, OGA, USA, Fin Aid, IR, Payroll, SAS, Controller, Records, Advising, and alt.

Scholarship Archive DB
Status: 6/30/09
End Date: Spring 2013
Project Manager: Richard Sigler/Scott Sax
Advocate(s)/Sponsor(s): Martha Whitney/Tim Snyder
Status: We are moving forward with the next phase of this project. This phase will focus on aligning the Academic Affairs Sharing Committee Database with Colleague (and thus having it populate Axon Monitor) and on the ability to publish faculty profiles to the Web (faculty can configure what information is displayed with their profile). The project team met with Curt Nais moments ago and will be building the profile export to Loyola specification. Loyola will be working to be able to consume and display the profiles on our Web site.

Course Evaluation Tool Implementation
Status: 5/1/12
End Date: TBD
Project Manager: Bernard Magyar
Advocate(s)/Sponsor(s): Todd Webster
Status: Complete Date: Advancement looking at schedule to move review data in the test environment.

Automation of Door Access
Status: 12/2/11
End Date: TBD
Project Manager: Bernard Magyar
Advocate(s)/Sponsor(s): Todd Webster
Status: This is tied to the ILM Update project. It is ready for test and will be moved into test when that project is ready to move into test.

Academic Directory Data Import
Status: 1/1/12
End Date: TBD
Project Manager: Bernard Magyar
Advocate(s)/Sponsor(s): Todd Webster
Status: Complete Date: Advancement looking at schedule to move review data in the test environment.

Digital Signage
Status: 1/1/3
End Date: TBD
Project Manager: Scott Sax
Advocate(s)/Sponsor(s): Terra Schiffer/Kristie Fisher
Status: New professional services proposal

Loyola University Maryland PMO Report

It can be scary when starting a new project and not knowing where the project is going to take you. A work breakdown structure (WBS) is a great tool for a project manager for defining the scope of the project and building the schedule. A work breakdown structure or WBS is a graphical hierarchy of all the work required on a project, broken up into smaller, more manageable components. The WBS is used to define the work (the tasks) that is required and how tasks can be organized and assigned within the schedule. It is one of the backbones of good project management.

If you would like help thinking through and building a WBS for your project contact the Project Management Office. We'll have you carving up your project into manageable components in no time. (We won't usually use a pumpkin.)

Questions? Contact pmo@loyola.edu.

Focus On....

Paperless University—Accounts Payable

This month, the Accounts Payable office went live with Perceptive Software’s ImageNow as part of the Paperless University initiative. This new system allows for electronic routing and approval of invoices for seven departments, automated check reconciliation and archival and tight integration with Colleague.

The implementation of ImageNow for Accounts Payable will reduce approval and payment processing time while eliminating duplicate paper copies.

―Michael Mansfield, Director, Student Administrative Services & Disbursements

With ImageNow, Accounts Payable has benefited from electronically routing invoices, being able to pay them quicker and we have the ability to store all of our records. More importantly Accounts Payable has been able to sit down and re-design our current payment process to be more efficient. A Win-Win for all!
Dana German
Project Manager
Information Technology Services
About UVA

- Founded by Thomas Jefferson in 1819 in Charlottesville, Virginia
- No. 2 best public university in the 2013 edition of the U.S. News and World Report rankings
- 11 Schools
- Nationally renowned academic medical center
- College at Wise in southwest VA
- 14,641 Undergraduates & 6,454 Graduates in 2012-2013
- Central IT dept of approx 240
- Oracle Financials/HR/Payroll
- PeopleSoft SIS
- Sakai-based LMS – UVaCollab
- SharePoint services for faculty and staff
- Internally hosted Exchange for faculty/staff; Gmail for students
- UVa Hive Virtual Desktop Services
- UVa Box Cloud Storage and Collaboration
- HPC platforms and software
Some of our current projects:

- ITIL Implementation
- Core Network Refresh
- Wireless Network Refresh
- New Enterprise Storage System
- VoIP
- Data Center Improvements
PM Maturity Score of 2.7

Recent IT training:
> 125 in basic PM
> 50 in ITIL Foundations

Robust Service Catalog (> 120 Services)

Sr IT Leadership team reviews and approves projects

New PM Repository Tool in SharePoint

ITS-wide adoption of PM Tools

IT PMO: Tools, Templates, Training

Increased Stakeholder Governance

Increased Stakeholder Governance

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Robust Service Catalog (> 120 Services)

ITS-wide adoption of PM Tools

IT PMO: Tools, Templates, Training

Increased Stakeholder Governance
Governance Example: VoIP Project Steering Committee with 18 senior level representatives from across the enterprise, including the Medical Center
Next Steps/Challenges

- Portfolio management & project prioritization policies & procedures - still in progress
- Improved integrated thinking about project resource assignments to multiple, related projects

Gartner recommendations for organizations at our PM maturity level:

- Formalization of program management & portfolio management roles; defined career path for PMs
- Move toward scheduling project start dates. Just because it’s approved doesn’t mean it needs to start now!
About VCCS

- 23 colleges, 40 campuses in Virginia
- 400,000 students
- Enterprise systems with a single instance:
  - PeopleSoft Student, Financial, HR
  - Blackboard LMS
- Project Management REQUIRED by legislation
Current Projects

- Decision Support (Blackboard Analytics)
- Workforce Enterprise System (August Lumens)
- Early Alert/Retention (Starfish)
- Portfolio Management System (TeamDynamix)
- Identify Management
Project Management

- 5 Years Ago, existed only for major projects (>$2M)
- Legislation required us to do more
- Started Project Board to oversee projects
  - Members include Chancellor’s Cabinet, Procurement, Grants, Budget
- Created Standards/Guidelines for all colleges
- Gartner PM Maturity Level 3.4 – low ratings in technology and financial value
- Still implementing, but we are on the way
Next Steps/Challenges

- Gartner Recommendations:
  - Move from prioritizing projects to true portfolio management.
  - Focus on scalable processes and increase the emphasis on program management.
- Implement portfolio management system, and expand Project Board “system wide”
- Implement metrics to measure value
Sherri Yerk-Zwickl
Director, Project Management and Web & Mobile Services
About Lehigh

- Founded 1865, in Bethlehem PA
- Private, residential research institution
- 4 colleges, 4800 undergrad, 2300 grad students
- Merged Library & Technology groups; 170 staff total; 100 technical staff
- Banner, Moodle, GoogleApps, etc.
- “Stealth” project management approach
Organizational Challenges

1 + 1 = 2 (Or 1!)
Organizational Challenges

Librarian

ITC

College Teams

CC

LIBRARY OPS

ESI

WMS

TELCO

HELP DESK

RESEARCH

WIRED

SNA
Accomplishments

1.7

“Stealth” PM
Adoption of PM Tools
Revamped Governance
Improved Communications
Creation of Service Catalog
Simplified Service Request Process
Take-Aways

- It’s all about organizational culture
- 1.7 but making progress
  - (we started at 0)
- We’ve come a long way, baby
  - (even though there’s lots to be done)
- Enjoy the journey
  - (patience Padawan)
Your Stories

You’ve heard our stories – time to hear your stories!
What is your Project Management IQ?

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High Performing
Customer Centric Perspective
Focus on Managing Related Projects
Operational Process Changes Happening

“Anything Goes – Just Get it Done”
WHAT IS YOUR PM MATURITY LEVEL?

You may respond at PollEv.com/e2013pmo when the presenter pushes this poll.

Text a KEYWORD to 37607

Total Results: 68

LEVEL 1: PML1 - 48
LEVEL 2: PML2 - 14
LEVEL 3: PML3 - 5
LEVEL 4: PML4 - 1
LEVEL 5: PML5
Discussion Time

- Gather with others at the same level
  - Take a few moments to introduce yourself and share some of your current issues
  - Note the ones that would be ideal to share with the broader group

- NOTE - Your level does not indicate maturity in all areas of project management
  - Strength in some areas and not in others
Questions to Consider

- Have you assessed your organization’s maturity using the Gartner model, or any other model?
- Have you managed, or been part of the core project team, for a highly successful project (on time, on budget, delivered what was expected, high user satisfaction)?
- Does your organization complete a formal project close-out process for projects? Always, Sometimes, Major Projects?
- Do your projects always have a formal governance structure, or project steering committee, in place?
- Does your organization utilize a Project Portfolio Management/Analysis system?
- Do your assigned PMs ever have production IT responsibilities and priorities that compete for time with assigned projects?
Sharing Time

- Share stories/problems from your group
- Can you provide a potential solution?

Try to keep this to 2 minutes per story so we can share more stories!
DO YOU KNOW WHAT YOUR NEXT STEPS ARE?

You may respond at PollEv.com/e2013pmo when the presenter pushes this poll.
- Text a KEYWORD to 37607
- Answers to this poll are anonymous.

**YES!**

---

**NOT**

Total Results: 19
On Monday Morning…

- Take inventory of your project management organization and related skills.
- Locate the weak points and identify ways in which they can be improved.
- Face reality. Just because "it's always been done this way" is no excuse for not making changes.
In 90 Days...

- **Level 1**
  - Find your project management heroes - individuals who are comfortable running a project in the midst of chaos.
  - Establish high level principles rather than rules. Start with just one.
  - Encourage people managing projects to form informal networks at your institution.
In 90 Days…

- Level 2
  - Tailor processes to fit the needs of the institution. Encourage their use.
  - Start thinking about portfolio management.
  - Assemble a prioritized list of projects for budget purposes.
  - Schedule project start dates.
In 90 Days…

- Level 3
  - Face reality – pursue a path that will deliver value to the institution.
  - Stop slicing resources and sequence work to deliver tangible value.
  - Move from prioritizing projects to true portfolio management.
  - Focus on scalable processes and increase the emphasis on program management.
In 90 Days…

- **Level 4**
  - Improve metrics for evaluating potential projects.
  - Focus on value related to core capabilities and realization of strategic objectives.
  - Enable change management.
  - Enhance communication and collaboration.
HOW MUCH DID YOU LEARN TODAY?

You may respond at PollEv.com/e2013pmo when the presenter pushes this poll

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Answers to this poll are anonymous.

NOTHINGNEW

JUSTALITTLE 6

LOTS 8
Gartner Maturity Model

- Full version of the maturity model is available electronically for everyone

- To get a Copy:
  - Add your name and email to our Google “electronic list” to receive a copy
Questions?

Louise Finn – lafinn@loyola.edu
Dana German – dba4c@virginia.edu
Joy Hatch – jhatch@vccs.edu
Sherri Yerk-Zwickl – shy2@lehigh.edu
EDUCAUSE 2013
ANNUAL CONFERENCE