Developing an Engagement Model from the Inside Out

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The George Washington University

March 25, 2014
Introduction

• Who are we?
  • Our University
  • Our Roles
Agenda

• Introduction
• Strategy and Engagement of Leadership
• Evolution of the DIT Engagement Model
• Evolving the PMO
• Questions & Answers
• Strategy and Engagement of Leadership

Brian Ensor, Assistant Vice President, Planning & Strategic Initiatives
Are we organized to succeed?

The four general types of operating models are:
1. Diversification (low standardization, low integration)
2. Coordination (low standardization, high integration)
3. Replication (high standardization, low integration)
4. Unification (high standardization, high integration)

Ross, Weill & Robertson, “Enterprise Architecture As Strategy: Creating a Foundation for Business Execution.”
http://vaughanmerlyn.com/2010/01/27/exploring-an-it-operating-model-for-enterprise-2-0/
The IT Strategic Plan Evolves
Alignment – University Strategic Plan

THEMES OF THE PLAN

The educational, research, and service goals of this strategic plan engage four broad themes that reflect our vision of the future as well as the current strengths of the university.

THESE THEMES ARE:

- Innovation through cross-disciplinary collaboration
- Globalization
- Governance & policy
- Citizenship & leadership
• Evolution of the DIT Engagement Model

Leslie Margolis, Director, Business Analysis & Advisory Services
Your People Know

Start with the Strategic Plans for setting the context

Conduct interviews with the Leadership team & a sample of all other levels and areas

- Establish Mutual Respect
- Ask about their perspective of the organization, division & group
- Ask how they think their customers feel about the division
- Ask about their pain points
- Give them a chance to be King or Queen for a day

Capture the notes & tag by theme

Pain Points become the Critical Success Factors
Continuously review & incorporate perspectives to build consensus
Once the Leadership team was in agreement, we began a travelling road show to introduce to each of the groups & explain what this was built upon:

- The Strategic Plan
- Their expressed pain points that turned into the Critical Success Factors

- We asked for their input again

- This was our final version that was then presented at the all hands

**Division of Information Technology Engagement Model**

- **CUSTOMERS**
  - Students, Faculty, Staff, Functions and Partners

- **Existing and Evolving Services**
  - End-to-End View of High Quality Customer Level Services

- **Outreach and Strategic Alignment, Portfolio Teams**
  - Introduce High Impact Customer Portfolio Teams, Vary in Size, Committed Resources

**Advisory Services & Assessments: Security, BI, Roadmaps**
- Customer Engagement Practice
- Programs, Project & Functional Portfolio Alignment
- Appropriate Soft Skills, Business Artifacts, Grow Understanding of Customer Needs, Prioritization based on Business Impact
- Launch of Specialized Services & Relationship Models (Incubator)

**Technology & Innovation Partners**
- Team, Leverage & Extend

**Shared Prioritization, Planning, Investment & University Enterprise Architecture**
- Continuous Information Sharing

**Risk Appropriate Protection**
- Trust Based Services
  - Security
  - Identity Management
  - Business Continuity

**User Experience Solution Center**
- Assemble-to-Build
  - Solution Design
  - Application Support
  - Integration Services
  - Mobile & Web
  - Information & Analytics
  - Development, QA, Databases & Data Management

**Deep Capability Resource Pools & Ops Support**
- Third Party Bench Strength & Specialized Services

**Host Environment**
- Extendable, Scalable Infrastructure Services
  - Network, Communications, Data Center, Platforms, Storage Capacity
  - Physical, Virtual, Cloud
Evolving the PMO

Christina Griffin, Director, Project & Portfolio Management Office
Aligning with Customers and Capabilities

**PPMO Resources**

<table>
<thead>
<tr>
<th>Focus Area</th>
<th>Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment Management</td>
<td>Graham Barker</td>
</tr>
<tr>
<td>OVPR</td>
<td>Cindy Spitzer</td>
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<tr>
<td>Office of Safety &amp; Security</td>
<td>Cheryle Homer</td>
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<tr>
<td>Transportation &amp; Parking Services</td>
<td>David Bell</td>
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<tr>
<td>Identity &amp; Access Management</td>
<td>Tielor Robinson</td>
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<tr>
<td>Sharepoint</td>
<td>Cindy Spitzer</td>
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<tr>
<td>ITSM</td>
<td>Denise Ross</td>
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<tr>
<td>BI</td>
<td>Cheryle Homer</td>
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<tr>
<td>Paycol, HR (ES-Banner)</td>
<td>Dori Sobhani</td>
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</tbody>
</table>

**Business Process: Intake**

- **Record:** Business Need/CSF, Business Impact
- **Review:** Architecture & Align to Customer, Capability & Service
- **Reply:** Acknowledge & Team to follow up Customer

**Discussion Proposal**

- Minimal effort
- Prior to Prioritization

**Identified Need:** Ideas, Service Requests, Product Backlogs

**Who prioritizes**

- Prioritized to proceed with developing proposal to define "what we are doing to what end" & with the right SMEs engaging with Customer

**Project Management Process - PMLC**

- Detailed Requirements & Solution Design thru move to Service

**Effort Underway:** Project plans, Sprints, DRs

**When prioritized with customer or forum, we must sync across. Appropriate Resources are identified**
Evolving from Project Management to Portfolio Management

Shared Prioritization
Planning
Investment
Enterprise Architecture

Strategic Planning

ITIC
- ISAC
- BAC
- BIAC
- Portfolio Meetings
- Operations (Service Advisory Committees & Technology Forums)

Capital Planning & Investment

IT Demand

Service Management

Council for Research Administration
FOPS
ITF
Other Non-IT Specific Committees

Agreed & Prioritized Goals
Funding
Measurements

Capacity Planning/Feedback
Key Takeaways

- **Start with the University’s Strategy** and align with it.

- You have to **define “what good looks like”**. It’s easy to check off the requirements and lose sight of the problems we were solving.

- **Tell your stories.** People need to see themselves in there. Help build a bridge from where you are today to where you want to be.

- As the picture comes together, **share early and often**. The end result needs to represent the team’s perspective.

- Portfolio management is fluid and therefore **planning must become more frequent and transparent** – use University cycles to help guide planning.

- Higher education institutions mature at varying speeds, therefore governance will evolve at differing rates - **use the right amount of process for your organization**
Questions & Answers

Thank-you!
Please fill out your survey

Continuing the Discussion

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