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
• Learn 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

I. Integration of IT Governance and Portfolio and Project Management for Success

II. IT Governance in Higher Education

III. Portfolio and Project Management Implementation

Five Group Exercises
Group Exercises

• **Reflections** on challenges and successes with IT Governance and PPM

• **Build** an IT Governance model

• **Design** your PPMO: Facilitate ITG : Resource Management : Monitor/Control and Center of Excellence

• **Plan implementation** of your PPMO
Workbook Contents

I. Presentation

II. Exercises

III. Supplemental information

💡 Select IT governance references (EDUCAUSE, ECAR, PMI references)

📝 Example materials such as charter, reports, resource forecast

🚀 Project and program management toolkits
IT Planning in Higher Education

Facilities Planning
Financial Planning

IT Planning
Academic Planning

IT Leadership Development
IT Strategic Planning
IT Governance
Strategy sets a destination; governance provides a route.
IT Governance

• Allocating IT Resources
  • Who
  • Why
  • How

• IT Governance defines
  • processes
  • components
  • structures
  • participants

for making decisions regarding the use of IT
ITG - Available Resources/Guidance

I. EDUCAUSE Center for Applied Research (ECAR)
   • Case studies
   • Whitepapers

II. Gartner, Inc.
    • Whitepapers

III. Project Management Institute
     • Standards for Portfolio Management

IV. Supplemental Information for this workshop
Draft Governance Model – Fall 2017

Executive

President’s Executive Council

Strategic

Council of Deans

Information Technology Leadership Council

CIO

Operational

Academic Technology Council

Enterprise Application Council

Information Security Advisory Council

Data Governance

Other & Ad Hoc Committees

Architecture & Infrastructure

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ITG – Why is it important?

**Decision-Making and Transparency**

Provides clearly defined and repeatable process for making decisions

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**Executives**

Meets Annually
Approves > $250K or 5K hours

**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

**Finance Subcommittee**

Meets Quarterly
Approves $0K and 250-850 hours
Prioritizes functional projects

**HR Subcommittee**

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**Student Subcommittee**

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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 – Why is it important?

Strategic Alignment of ENTERPRISE and IT

How do you know if you are aligning IT projects and resources towards strategic initiatives and goals?

Summary of AITS Current Progress Towards Strategic Goals as of June 30, 2016

<table>
<thead>
<tr>
<th>Progress</th>
<th>Critical</th>
<th>Waiting on Someone</th>
<th>Off Target</th>
<th>Not Started</th>
<th>Deferred</th>
<th>On Target</th>
<th>Achieved</th>
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<tr>
<td>Goal</td>
<td>0</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>37</td>
<td>1</td>
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<td>Team 1</td>
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<td>0</td>
<td>5</td>
<td>0</td>
<td>1</td>
<td>18</td>
<td>12</td>
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<td>13</td>
<td>1</td>
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<tr>
<td>Team 3</td>
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<td>0</td>
<td>0</td>
<td>0</td>
<td>20</td>
<td>1</td>
</tr>
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<td>Team 4</td>
<td>0</td>
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<td>0</td>
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<td>Team 5</td>
<td>0</td>
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<td>0</td>
<td>0</td>
<td>8</td>
<td>23</td>
<td>1</td>
</tr>
<tr>
<td>Team 6</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>14</td>
<td>3</td>
</tr>
</tbody>
</table>
ITG – Why is it important?

Resource Allocation and Management

Competition for pooled resources and collaboration encourages decisions towards projects of the most value.

<table>
<thead>
<tr>
<th>Year</th>
<th>Mandatory %</th>
<th>Customer Request %</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY09</td>
<td>58%</td>
<td>42%</td>
</tr>
<tr>
<td>FY10</td>
<td>25%</td>
<td>75%</td>
</tr>
<tr>
<td>FY11</td>
<td>44%</td>
<td>56%</td>
</tr>
<tr>
<td>FY12</td>
<td>49%</td>
<td>51%</td>
</tr>
<tr>
<td>FY13</td>
<td>57%</td>
<td>43%</td>
</tr>
<tr>
<td>FY14</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>FY15</td>
<td>61%</td>
<td>39%</td>
</tr>
<tr>
<td>FY16</td>
<td>44%</td>
<td>56%</td>
</tr>
</tbody>
</table>
ITG – Why is it important?

Performance Management

Measure project/service performance to budget/schedule and success against objectives

Schedule Performance by FY

- On Target
- Off Target
- Critical

Budget Performance by FY

- On Budget
- Off Budget
- Critical
Collaboration Opportunities for vertical and horizontal collaboration and communication encourages better decisions and improves relationships.
ITG – Why is it important?

**Enhances opportunities for shared use, reuse, integration, and interoperability of technologies**

<table>
<thead>
<tr>
<th>Standards and Policy</th>
<th>Security</th>
<th>Monitoring</th>
<th>Storage/Backups</th>
<th>Backup/Disaster Recovery</th>
<th>Co-location Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITG</td>
<td>275 vended applications supported</td>
<td>Data and Physical Protection</td>
<td>Application, Server, ORCA, Systems, Network</td>
<td>439 TB configured storage</td>
<td>Change, Project, Configuration, and Release Management</td>
</tr>
<tr>
<td></td>
<td>1,226 databases supported</td>
<td>Vulnerability Scanning Attack Monitoring/Remediation</td>
<td>Co-location Services Hosting hardware for other organizations</td>
<td>1.5 PB total backups</td>
<td></td>
</tr>
<tr>
<td></td>
<td>688 major software applications and business processes supported</td>
<td>Monitoring</td>
<td>Backup/Disaster Recovery</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>15,283 square feet Data Centers Chicago &amp; Urbana</td>
<td></td>
<td>24x7x365 System Support</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
ITG – Why is it important?

**TRANSPARENCY**

- Clear understanding where IT decisions are made
- Understanding of cost distribution and roll-ups
- Clear understanding of where services are offered and how to access them

### Projects by the Numbers

**Investment**

- **3:1 ROI**
  - Project benefits vs. costs
- **$1.4M**
  - FY15 funding
- **79,473**
  - UA actual project hours FY15

**ITPC Projects to Date**

- **513** reviewed
- **445** approved
- **65** rejected/withdrawn
- **53** in progress/in queue
- **$23M**
  - Funding
- **$50M**
  - Contributed labor costs

**Projects in Progress and Queue at 7/1/15**

- **16** Finance
- **13** Student
- **12** Technology
- **10** HR
- **1** BI/PM
- **1** Research Admin

- **86,700**
  - Approved FY15 ATS project hours in queue
- **53%**
  - Increase in project backlog from FY10 to FY15

**Customer Requested vs. Mandatory**

- **37/16**
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?

- Collect Ideas
- Rolling Prioritization
- Review and Select

**WHAT NOW?**
Making It Work

**HOW**
do you drive the ITG process?

**WHAT**
information is required for the participants?

**HOW**
do we execute the things that ITG approves?

**WHO**
is going to work on the initiatives and when?

**HOW**
do we track the status and performance for these initiatives?
Making It Work: Portfolio & Project Management

- Facilitate ITG
- Manage schedule and resources
- Monitor and control portfolio
- Project management center of excellence
- Project execution
In order to be most successful, you need all of the pieces:

- IT Governance
- Portfolio Management
- Project Management
Group Interactive Activity

Challenges and Successes with ITG and PPM
Group discussion on participant’s challenges and successes with IT Governance and PPM

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 ITG and PPM

What works well?
Challenges and Successes with ITG and PPM

What are areas for improvement?
Challenges and Successes with ITG and PPM

How would you like to see things change?
IT Governance in Higher Education
Scope of Customers & Providers for IT

IN

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  Office of Web Services  UIS - OIR  UIS COLRS
AITS  BIS  DS  HRIS

OUT
A repeatable, rational process is required to:

- collect ideas
- select initiatives
- prioritize
ITG - Considerations

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

What is your level of demand?
• 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://www.itpc.uillinois.edu/
- http://cio.umich.edu/governance/strategic-governance.php
- http://www.it.northwestern.edu/bin/docs/it-gov-org-chart.pdf
- https://oit.ucla.edu/it-governance/governance-process
- https://is.wfu.edu/university-adopts-new-it-governance-structure/
ITG Model Components – System Example
ITG Model Components – Campus Example
ITG Model Components – Campus Example

- Executive Steering
- Faculty Advisory Committee
- IT Service Delivery
ITG Model Components – IT for Supporting University Business Processes example

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**Highest Level Customers**

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- **Finance Subcommittee**
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  - Prioritizes functional projects

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  - Prioritizes functional projects

- **Business Intelligence/Performance Management Subcommittee**
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  - Prioritizes functional projects
ITG Governance – Who, What, When

Customer Requested Projects in Queue (additional regulatory and mandatory projects)

1. ITPC-0306 Banner Relationship Management (BRM) Implementation
2. ITPC-0353 Learning Management Systems (LMS) Banner Integration
3. ITPC-0363 UAFR: FOAPAL Maintenance Web Application
4. ITPC-0367 Service Desk Management Front-end
5. ITPC-0368 Athletics NCAA CAI
6. ITPC-0370 Costing Application Analysis
7. ITPC-0374 Enterprise Academic Leave Tracking and Reporting
8. ITPC-0375 Identity and Access Management (IAM)
9. ITPC-0398 UAFR: Surplus Warehouse Inventory System
10. ITPC-0408 GCO: Sponsor Remittances
11. ITPC-0412 Online Course Catalog
12. ITPC-0421 Employee Training Infrastructure Analysis
13. ITPC-0428 PARIS Prior pay adjustments
14. ITPC-0429 Vendor Portal
15. ITPC-0435 UPE: Database Analysis
16. ITPC-0438 DRES Integrated IT Solution Analysis
17. ITPC-0441 Implement Banner 9 (Banner XE) Events Management
19. ITPC-0444: Finance Reports Distribution
20. ITPC-0447 CCFO System Enhancements
21. ITPC-0449 UAFR: Banner Feeder Application
22. ITPC-0453 Analysis and Implementation of iBuy data into the EDW
23. ITPC-0461 New Hire Redesign Implementation
24. ITPC-0462 HR and Payroll Legacy Databases - Equivalent Access Analysis
25. ITPC-0464 Position Tracking System for Civil Service Employees
26. ITPC-0466 HireTouch Data Acquisition Phase 2 – Custom Forms Data
27. ITPC-0467 Automated Grade Change Process
28. ITPC-0468 Ad Astra UIC Unit Pilot
29. ITPC-0469 Finance Reports Distribution Role Application
30. ITPC-0471 Implement ICS Data into the EDW
31. ITPC-0472 UAFR: Investment Income Distribution Application Rewrite
32. ITPC-0480 Preferred Name Analysis
33. ITPC-0483 Tableau License Expansion
34. ITPC-0491 DRES Integrated IT Services Implementation
35. ITPC-0492 UAFR: Account Code Search Application
36. ITPC-0493 UOCPRS: Capital Project Management System
37. ITPC-0494 UAFR: Biennial Inventory System
38. ITPC-0495 Emergency Notification Service
39. ITPC-0496 NetID Length Expansion
40. ITPC-0497 Multi-Factor Authentication
41. ITPC-0498 Retro Pay
42. ITPC-0499 ATIS: Message Enable XCOAPAL Application Implementation
43. ITPC-0502 Employee Training Infrastructure Implementation
44. ITPC-0503 Document Management Service Analysis
45. ITPC-0504 Student CRM Implementation
• 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 – Building the Model
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?

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

Focus

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

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

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

ITG Components – Building Blocks for Model

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ITG Components

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Finance
HR
Student
Business Intelligence/Performance Management

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

**Education**
- Leading Management Systems
- Instructional Technologies
- Performance Measurement
- Strategic Planning
- Operations
- Service Levels
- Public Labs
- Change Management
- Student Access to Resources

**Research**
- User Support Coordination
- Research Computing Resources
- Collaboration Technologies
- Grants Administration
- Technical Support
- Performance Measurement
- Strategic Planning
- Operations
- Service Levels

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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).

Example:

Govern IT Projects that Support Business Process 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:
ITG Components – Building the Model
Identify the subject matter

May be many pieces, or may be a few.
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
30 Minute Break

9:30 – 10:00 AM
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?

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

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?
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
**WHO Chooses?**

**Central IT Group**

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

**Without ITG**
Internal decisions by IT management regarding project selection, prioritization, and resource allocation for services

---

**ITG Participants – Why is it important?**

Example
ITG Participants – Why is it important?

Example

WHO CHOOSES?

How do you get to equilibrium?
## ITG Model Components – Participants

### Example

<table>
<thead>
<tr>
<th>Existing Groups</th>
<th>New Groups</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Council of CIOs</td>
<td>• Functional Groups</td>
<td>• Advisory &amp; Decision-making</td>
</tr>
<tr>
<td>• Faculty IT Senate</td>
<td>• LMS Advisory Council</td>
<td>• Group Sponsors</td>
</tr>
<tr>
<td>• IT Pros</td>
<td>• Shared Infrastructure</td>
<td>• Chairs / Leads / Owners</td>
</tr>
<tr>
<td>• Council of Deans</td>
<td>• Identity Management</td>
<td>• Governance Office/Portfolio Management</td>
</tr>
<tr>
<td>• CAV</td>
<td>• Business Process</td>
<td></td>
</tr>
<tr>
<td>• Student Senate</td>
<td>• WCMS</td>
<td></td>
</tr>
<tr>
<td>• Business Managers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• IT Priorities Committee</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## ITG Model Components

### Participants in the Process – Example

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

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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

<table>
<thead>
<tr>
<th>Type</th>
<th>Type Rank</th>
<th>Overall Rank</th>
<th>Initiative</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Base</strong></td>
<td>1</td>
<td>1</td>
<td>Project/Service A</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>2</td>
<td>Project/Service B</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>3</td>
<td>Project/Service C</td>
</tr>
<tr>
<td></td>
<td>4</td>
<td>6</td>
<td>Project/Service D</td>
</tr>
<tr>
<td></td>
<td>5</td>
<td>11</td>
<td>Project/Service E</td>
</tr>
<tr>
<td></td>
<td>6</td>
<td>12</td>
<td>Project/Service F</td>
</tr>
<tr>
<td><strong>Project</strong></td>
<td>1</td>
<td>4</td>
<td>Project/Service G</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>7</td>
<td>Project/Service H</td>
</tr>
<tr>
<td></td>
<td>3</td>
<td>9</td>
<td>Project/Service I</td>
</tr>
<tr>
<td><strong>Ancillary</strong></td>
<td>1</td>
<td>5</td>
<td>Project/Service J</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>8</td>
<td>Project/Service K</td>
</tr>
<tr>
<td><strong>Fee</strong></td>
<td>1</td>
<td>10</td>
<td>Project/Service L</td>
</tr>
<tr>
<td><strong>Unfunded</strong></td>
<td>1</td>
<td>13</td>
<td>Project/Service M</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>14</td>
<td>Project/Service N</td>
</tr>
</tbody>
</table>
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
Responsibilities for a Group

Example

- 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

<table>
<thead>
<tr>
<th>Transactions</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Application Transactions</td>
<td>299,000</td>
</tr>
<tr>
<td>Registration Record Transactions</td>
<td>12,343,500</td>
</tr>
<tr>
<td>Financial Aid Disbursements</td>
<td>556,000</td>
</tr>
<tr>
<td>Transcripts Processed</td>
<td>113,000</td>
</tr>
<tr>
<td>eProcurement Transactions</td>
<td>157,500</td>
</tr>
<tr>
<td>Non-iBuy Purchase Orders</td>
<td>25,000</td>
</tr>
<tr>
<td>Financial Aid Records</td>
<td>467,000</td>
</tr>
<tr>
<td>Payment Requests Processed</td>
<td>479,000</td>
</tr>
<tr>
<td>HR Front-end Transactions</td>
<td>138,100</td>
</tr>
<tr>
<td>Travel Expense Reimbursements</td>
<td>153,000</td>
</tr>
<tr>
<td>Data Warehouse Sessions</td>
<td>240,000</td>
</tr>
<tr>
<td>Regular Payroll Transactions</td>
<td>882,000</td>
</tr>
<tr>
<td>FY 14 Banner Availability</td>
<td>99.99%</td>
</tr>
</tbody>
</table>
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 & 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
• Communication and transparency are 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
ITG Organization

Doesn’t have to be one big process
ITG Organization

IT may be SEVERAL processes
ITG Organization

COMMUNICATING & INTERACTING AS NEEDED
ITG Organization

WHAT’S **NOT** WORKABLE IS NO PROCESS OR CHAOS
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.
Tips & 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.
Tips & 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 reevaluate the process and adjust as necessary.
ITPC Review Major Improvements

• After 3 years, ITPC overhauled in 2007
• Notable improvements
  o Improving the alignment of project selection to strategic plans
  o Improving cross-functional prioritization of projects
  o Making adjustments to the review structure and committee membership
  o Improving communication outside of the process
  o Delegation of decision making for “small” projects
  o Normal periodic process reviews
ITPC Review Major Improvements

• Major review again in 2016
• Notable improvements
  o Improve process to enhance/reward strategic alignment
  o Utilize a social business software tool to improve collaboration and communication
  o Improve summary level information for project eval
  o Determine funding model for unfunded mandates
  o Deemphasize review of mandatory projects
  o Clearly define process for projects with shared funding
Group Interactive Activity

Designing IT Governance
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 Interactive Activity

Build an IT Governance Model

• Walk through defining the components for an ITG structure you are interested in building **(50 minutes)**
• Brief group discussion in between questions.
• Group discussion at end **(10 minutes)**
Group Interactive Activity

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?
Group Interactive Activity

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

Who should be involved?
Group Interactive Activity

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

What and where will decisions occur in the ITG process? What resources will be allocated via the process?
Design an IT Governance model for your institution. Answer key questions at the right level of complexity to meet your needs:

How is the process/group(s) structured?
Group Interactive Activity

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

How will you manage the ITG process?
Group Activity Wrap-Up

Discussion and Q&A
Implementing Portfolio and Project Management
Afternoon Topics

Overview of portfolio management

- Facilitate ITG | Manage schedule and resources | Manage portfolio | Serve as center of excellence for project management
- Activity

Implementing a PPMO, a step by step guide

- Define work | Manage portfolio | Introduce project management | Establish systems and tools
- Exercise

Brief overview of project management
Facilitate ITG | Manage schedule and resources | Manage portfolio | Serve as center of excellence for project management

Overview of Portfolio Management
Main activities for a portfolio manager/ or portfolio management office:

- Facilitating project selection and prioritization
- Scheduling and resource management
- Managing (aka monitoring and controlling) the portfolio
- Providing project management standards and guidance

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.
Portfolio Management

**How it can help**

- Provides clear set of priorities for approved projects
- Provides a manageable workload for project resources
- Answers the question: What are we working on?

**Steps in the Portfolio Management Process:**

1. **Review and Select**
2. **Rolling Prioritization**
3. **Collect Ideas**
4. **Execute**
5. **Schedule**

**Exit:** Project Management Center of Excellence
## Portfolio Management Goals

- **Center of excellence for project management**
  - Improve performance
  - Provide support

- **Facilitate ITG**
  - Facilitate governance
  - Communicate Priorities.

- **Manage portfolio**
  - Monitor and control portfolio
  - Report on performance
  - Monitor performance and make adjustments

- **Manage resources**
  - Ensure project success

- **Resource management and scheduling**
  - Manage expectations
  - Justify staffing
  - Manage workload
  - Schedule work

---

**GOVERNING BODY**
- Portfolio management provides services to-

**PERFORMING BODY**

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**Facilitate ITG**

**Drive the Process**

- Facilitate the creation of evaluation criteria and portfolio strategy
- Provide assistance for proposal creation (L1, L2, L3)
- Facilitate the proposal selection and prioritization process
- Coordinate & communicate
Portfolio Manager Activities

- Help with proposals
- Maintain and enforce process and artifacts
- Establish and maintain quality
- Annual reports
- Coordinate meetings
- Work with committee leads
- Be a liaison
- Prepare meeting materials
- Frame decision points
- Facilitate business case prep
- Maintain membership
- Inform stakeholders of decisions
- Maintain repository of key documentation
- Maintain ITG website(s)
- Facilitate priority setting
Tools

Prioritization tools

Strategy assessment

Project proposals

Visualization
Project Proposals

Level 1 Project Proposal

To be completed for all requests that require more than 250 hours of effort and/or project budgets greater than $20,000. For requests that require more than 500 hours of effort or with project budgets greater than $100,000, the Level 2 version of this template should be completed instead of this one. For additional information regarding ITPC, visit www.itpc.uillinois.edu.

1) Project Name: Banner Preferred Name and Gender Analysis
   Campuses affected by project (UIC/UIUC/UIS/UA): ALL
   Date Template Submitted to ITPC: 4/29/2014; Full ITPC Requested Revision: 6/12/14

2) Sponsor(s):
   ITPC project sponsors must be individuals and cannot be groups. Being a project sponsor implies project ownership as a key stakeholder in the project and may require active project participation in a sponsor or advisory role.

<table>
<thead>
<tr>
<th>Name</th>
<th>Campus</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mike Kamowski</td>
<td>UIC</td>
<td>OSSS</td>
</tr>
<tr>
<td>Robert Dixon</td>
<td>UIC</td>
<td>Registration and Records</td>
</tr>
<tr>
<td>Rod Hoving</td>
<td>UIUC</td>
<td>Office of the Registrar</td>
</tr>
<tr>
<td>Brian Catherwood</td>
<td>UIS</td>
<td>Records and Registration</td>
</tr>
<tr>
<td>Cynthia Lindstrom</td>
<td>UIC</td>
<td>ACCC</td>
</tr>
<tr>
<td>Megan Carney</td>
<td>UIC</td>
<td>UIC Gender and Sexuality Center</td>
</tr>
</tbody>
</table>

3) Project Description
   a) Provide a simple, high-level description of the project that clearly states the overall business goal of the initiative and the role of the technology component. If the description is highly technical or utilizes acronyms, please provide a one-paragraph summary in layman’s terms of the project.

4) Impact if we do not do this project:
   If we do not do this project, Banner application projects will continue to be run ad-hoc and the quality of these projects will vary with the experience of the project lead and manager. In addition, there is a slight chance that additional cost would be added to projects as our clients choose a third party as an implementation partner.

5) Estimated project cost (rough estimate for prioritization and resource planning purposes)

<table>
<thead>
<tr>
<th>Resource type (Role)</th>
<th>Department</th>
<th>Estimated hours</th>
<th>Description of work</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project manager and FM/MLC SME</td>
<td>FMO</td>
<td>60</td>
<td>Lead project, get agreement, create initial set of documentation (task list and descriptions, templates, overview presentation) for revision and review.</td>
</tr>
<tr>
<td>SDLC SME and project sponsor, Nyle Bolliger</td>
<td>ADSD</td>
<td>20</td>
<td>Provide expertise on vended application tasks and templates. Offer vended application overview to ITS groups. Review and approve final set of documentation. Work outside the project to revise the SDLC methodology document.</td>
</tr>
<tr>
<td>Vended Application Support SME</td>
<td>Application Support</td>
<td>20</td>
<td>Provide expertise on vended application task and templates. Help define success criteria for a vended application project. Review and approve final set of documentation.</td>
</tr>
</tbody>
</table>
# Proposal Summary and Rating

- **Description**
- **Benefits and process change**
- **Probability of success**
- **Business value**

---

## Project Name
ITFC-0541: Provide system enhancements to help ensure continued efficient operation of HR offices and University Payroll and Benefits (HR/PAY/Benefits enhancements)

### Description

- **Sponsors**
  - Tony Foster, Natalie Taylor, Stephanie Ross, Dan Stover, Carol Krueger, Angela Haux, Lisa Stern, Michael Shofer, Jennifer Hyer, David Cohn

- **Brief project description**
  - The HR/Pay and Benefits systems are used by the University of Illinois HR offices to process more than 400,000 HR transactions per year and approximately 50,000 prior year payment adjustments. Ongoing maintenance and enhancements of these systems ensure the continued efficient operation of the HR office and University payroll and benefits. This project will provide the resources and structure for providing a set of enhancements prioritized by the HR/PAY/Benefits steering team. Implementing these enhancements will provide a better user experience in both applications, increase transaction efficiency and quality, and reduce the need for at least two UCM databases that currently administer the process for separation and cost payments. In addition, the change request “ITFC-0541 - HR new hire and job change processes” will resolve gaps in the award payment process. Enhancements that are not implemented as part of this project will be considered for future proposals.

### Impact Score

- **Strategy**
- **Service**
- **Enterprise**
- **Savings**

- **Success Score**
  - **TBD**

- **Benefits**
  - Expected benefits: Maintenance and provides prioritized enhancements to critical HR and Payroll systems. Ensures efficient and error-free processing of over 170,000 transactions per year. Complete cost/benefit analysis is available in the appendix of the proposal.

### Value

- **5-Year Return**
  - **528K**

- **5-Year ROI**
  - **3.3**

### Resources

- **Total Project Cost**
  - **$ 161,940**

- **Requested ITFC Funding**
  - **$ 0**

- **Total Hours**
  - **4,192**

- **UA IT Hours**
  - **2,412**

---

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Portfolio Strategy and Project Ratings

- Review University strategic plan, assess current portfolio, bring to group for discussion.

- Develop initial rating proposal, bring to group for discussion and adjustment.

<table>
<thead>
<tr>
<th>Probability of success (reverse of risk)</th>
<th>Score</th>
<th>Weight</th>
<th>Weighted Score</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Institutional commitment</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Two institutional and management support for this project from all affected parties</td>
<td>2</td>
<td>5.00</td>
<td>10.00</td>
<td></td>
</tr>
<tr>
<td>1 There is moderate institutional and management support for this project from all affected parties</td>
<td>1</td>
<td>5.00</td>
<td>5.00</td>
<td></td>
</tr>
<tr>
<td>0 There is minimal institutional and management support for this project from all affected parties</td>
<td>0</td>
<td>5.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>2 Institutional readiness</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 The sponsoring organization is ready to provide required project resources upon approval and there are no other barriers to project initiation</td>
<td>2</td>
<td>5.00</td>
<td>10.00</td>
<td>Some questions as institutional commitment and ratings worksheet.</td>
</tr>
<tr>
<td>0 The sponsoring organization still needs to secure/obtain required project resources upon approval or there may be other barriers that inhibit proceeding with project</td>
<td>0</td>
<td>5.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>2 Project team composition</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 The project team will involve staff from one unit</td>
<td>2</td>
<td>5.00</td>
<td>10.00</td>
<td>New question, based on past performance of EPC projects.</td>
</tr>
<tr>
<td>1 The project team will involve IT staff from one unit and functional staff from multiple units</td>
<td>1</td>
<td>5.00</td>
<td>5.00</td>
<td></td>
</tr>
<tr>
<td>0 The project team will involve staff from multiple units</td>
<td>0</td>
<td>5.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>2 Technology/vendor maturity</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 The technology being utilized is proven, mature and the risk associated with it is low, it is not unique to the University.</td>
<td>2</td>
<td>5.00</td>
<td>10.00</td>
<td>Some questions on technology/vendor maturity on risk ratings worksheet.</td>
</tr>
<tr>
<td>1 The technology or vendor being utilized is somewhat unique or unfamiliar to the University.</td>
<td>1</td>
<td>5.00</td>
<td>5.00</td>
<td></td>
</tr>
<tr>
<td>0 The technology or vendor being utilized is not in a mature state and is unfamiliar with the technology or vendor.</td>
<td>0</td>
<td>5.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>2 Risk/Implementation timeframe</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 The proposed timeframe for implementation is reasonable and attainable.</td>
<td>2</td>
<td>5.00</td>
<td>10.00</td>
<td>Some questions on risk/implementation timeframes on risk ratings worksheet.</td>
</tr>
<tr>
<td>1 There is moderate risk that the proposed timeframe for implementation may not be met.</td>
<td>1</td>
<td>5.00</td>
<td>5.00</td>
<td></td>
</tr>
<tr>
<td>0 The proposed timeframe for implementation is unlikely to be met.</td>
<td>0</td>
<td>5.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>2 Requires multi campus standardization and agreements</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Standard business processes are in place.</td>
<td>2</td>
<td>5.00</td>
<td>10.00</td>
<td>New question, based on past performance of EPC projects.</td>
</tr>
<tr>
<td>1 This project will require minor adjustments of business processes.</td>
<td>1</td>
<td>5.00</td>
<td>5.00</td>
<td></td>
</tr>
<tr>
<td>0 This project will require standardization of business processes across multiple campuses and units</td>
<td>0</td>
<td>5.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>2 Complexity</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 This project is not expected to be very complex.</td>
<td>2</td>
<td>5.00</td>
<td>10.00</td>
<td>New question, based on past performance of EPC projects.</td>
</tr>
<tr>
<td>1 This project is expected to have above average in complexity for EPC projects.</td>
<td>1</td>
<td>5.00</td>
<td>5.00</td>
<td></td>
</tr>
<tr>
<td>0 This project will impact multiple systems controlled by multiple campus units and is expected to be complex.</td>
<td>0</td>
<td>5.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>2 Change management effort</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2 Low/no change management effort</td>
<td>2 5.00</td>
<td>5.00</td>
<td>10.00</td>
<td>New question, based on past performance of EPC projects.</td>
</tr>
<tr>
<td>1 Moderate amount of change management activity is required.</td>
<td>1 5.00</td>
<td>5.00</td>
<td>5.00</td>
<td></td>
</tr>
<tr>
<td>0 Significant change management effort such as training, town halls, etc.</td>
<td>0 5.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Other success factors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 Business process improvement effort completed prior to project.</td>
<td>1 5.00</td>
<td>5.00</td>
<td>5.00</td>
<td></td>
</tr>
<tr>
<td>0 Other risks TBD</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total 50
## Priority Details

- Name & description
- Area
- Approval date and aging
- Effort
- Start date
- Notes
- Priority

### ITPC Projects for Prioritization

**8/14/14 7:22 AM**  
Red = approved more than 365 days ago, Yellow=240-365

#### Projects for Prioritization

<table>
<thead>
<tr>
<th>Name</th>
<th>Area</th>
<th>Approved</th>
<th>Effort</th>
<th>AITS Effort</th>
<th>ITPC Funding</th>
<th>Project Start Date</th>
<th>Funct. Priority</th>
<th>Last ITPC Rank</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITPC-0462 HR and Payroll Legacy Databases - Equivalent Access Analysis</td>
<td>Human Resources</td>
<td>Aug 2013</td>
<td>820</td>
<td>380</td>
<td>$0</td>
<td>TBD</td>
<td>3</td>
<td>1</td>
<td>This project will produce an analysis of and an implementation proposal for providing UC HR, US HR, and UA Payroll access to pertinent data elements housed in the legacy ECO5 and P2O databases. This data is currently only available to departments at UUC. The primary beneficiaries of this project, once the implementation is completed, are campus and UA HR staff.</td>
</tr>
<tr>
<td>ITPC-0463 GCO: Federal Financial Report Modification</td>
<td>Finance</td>
<td>Jan 2013</td>
<td>745</td>
<td>470</td>
<td>Feb 2015</td>
<td>1</td>
<td>2</td>
<td>This project will alter the process for filing the required Federal Financial Report (FFR) to the federal granting agencies by creating a modification to the Banner FFR process introduced in the 8.2 Upgrade. The business goal is to improve the timeliness, effectiveness, and accuracy for filing the FFR, which is currently a very labor intensive process.</td>
<td></td>
</tr>
<tr>
<td>ITPC-0465 HireTouch Data Acquisition Phase 2 – Custom Forms Data</td>
<td>Human Resources</td>
<td>Nov 2013</td>
<td>3,720</td>
<td>2,570</td>
<td>$0</td>
<td>Jan 2015</td>
<td>1</td>
<td>4</td>
<td>This project will add the meaning HireTouch data into the EDW, to enable users to produce reports with all the necessary information. Analysis of data in the custom forms will allow HR staff to report on trends related to the hiring process. This trend analysis will assist in the recruitment process by providing colleges and departments insight into common stopping points in the hiring process. This will also help colleges and departments work toward a hiring process that is more effective and efficient than it currently. Identifying issues in the hiring process, such as common reasons for declined job offers, will allow colleges and departments to adjust processes to retain desired faculty and faculty support staff.</td>
</tr>
<tr>
<td>ITPC-0533 Learning Management Systems (LMS) Banner Integration</td>
<td>Student</td>
<td>Aug 2010</td>
<td>1,220</td>
<td>848</td>
<td>$22,725</td>
<td>TBD</td>
<td>3</td>
<td>6</td>
<td>Required features not available. Performance issues with current version. This project is designed to meet the faculty and colleges request for integrating the UI Learning Management Systems with Banner. This phase will be to implement the Banner eLearning 5.0 functionality. This interface is supported by SunGard and provides for registration and grading. The solution will be for Blackboard. Phase 2 (ITPC-0394) will be for the University to...</td>
</tr>
</tbody>
</table>
# Budget Impact and Ranking for New Projects

## Independent Ranking of New Projects

<table>
<thead>
<tr>
<th>Project</th>
<th>Score</th>
<th>StdDev</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITPC-0467 Hw/Touch Data Acquisition Phase 2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ITPC-0467 Automated Grade Change</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Functional Priorities

<table>
<thead>
<tr>
<th>Project</th>
<th>Functional Priority</th>
<th>Total Hours</th>
<th>ITPC Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITPC-0467</td>
<td>Student Priority 1</td>
<td>1.415</td>
<td>1.145</td>
</tr>
<tr>
<td>ITPC-0458</td>
<td>Finance</td>
<td>1.423</td>
<td>1.063</td>
</tr>
<tr>
<td>ITPC-0466</td>
<td>IR Priority 2</td>
<td>2.770</td>
<td>2.570</td>
</tr>
</tbody>
</table>

| Total                                      | 5,558              | 4,778       | $0         |

## ITPC Funding Today - As Is

<table>
<thead>
<tr>
<th>FY 14</th>
<th>FY 15</th>
<th>FY 16</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1.35</td>
<td>$1.40</td>
<td>$1.40</td>
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</tbody>
</table>

## AITS Project Backlog - Approve All Projects

<table>
<thead>
<tr>
<th>FY 14</th>
<th>FY 15</th>
<th>FY 16</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1.35</td>
<td>$0.05</td>
<td>$1.40</td>
</tr>
</tbody>
</table>

## ITPC Funding - As Is

<table>
<thead>
<tr>
<th>FY 14</th>
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</tr>
</thead>
<tbody>
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<td>$1.35</td>
<td>$0.05</td>
<td>$1.40</td>
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</tr>
</thead>
<tbody>
<tr>
<td>$1.35</td>
<td>$0.05</td>
<td>$1.40</td>
</tr>
</tbody>
</table>

## Notes

### Financial Return
- ITPC-0467: Offers ROI in Year 4+
- ITPC-0458: Offers ROI in Year 2.5
- ITPC-0466: Offers ROI in Year 1

### Service Improvement
- ITPC-0467: Will only improve service efficiency.
- ITPC-0458: Will moderately improve service efficiency.
- ITPC-0466: Will significantly improve service efficiency.

### Institutional Commitment
- ITPC-0467: There is some institutional and management support for this project from all affected parties.
- ITPC-0458: There is moderate institutional and management support for this project from all affected parties.
- ITPC-0466: There is broad institutional and management support for this project from all affected parties.

### Institutional Readiness
- ITPC-0467: The organization is unable to commit the required project resources.
- ITPC-0458: The organization is ready to provide project resources.
- ITPC-0466: The organization is ready to provide project resources.

### Risk: Implementation Timeline
- ITPC-0467: There is moderate risk of delays in implementation.
- ITPC-0458: There is moderate risk of delays in implementation.
- ITPC-0466: There is moderate risk of delays in implementation.

### Technology and Vendor Maturity
- ITPC-0467: The technology or vendor being used is not a mature technology.
- ITPC-0458: The technology or vendor being used is not a mature technology.
- ITPC-0466: The technology or vendor being used is not a mature technology.
Challenges

- Estimating costs & benefits
- Sponsor buy-in to process
- Keeping up / not becoming a bottleneck
- Not becoming too heavy
- “We don’t have time for this” argument

“We don’t have time for this” argument
Our Lessons / Experiences

- Strategic focus
- Communication outside of committee groups
- Prioritization and approvals (XFG Creation)
Resource Management and Scheduling

**BRIDGE ITG WISHES AND ORG REALITIES**

- Control the start of projects to even out the workload
- Manage client and upper management expectations
- Document resource demand and justify staffing changes
- Decrease project lifecycle times
- Validate priorities
Tasks

- Work with external stakeholders to prioritize
- Work with internal stakeholders to schedule
- Forecast resource demand and capacity
- Facilitate resource assignment and negotiation
- Facilitate time tracking
- Communicate
Tools

In flight priorities

Resource projections

Reporting tools

Scheduling meetings

Time tracking

#EDU17
Scheduling meetings

When can work start?

• Once a month for functional managers
• Review project status
• Discuss start dates and pipeline
• Avoid starting too many projects!

Purpose

The purpose of this meeting is

• To provide a forum for collaboration on projects and work requests
• To raise awareness of current and upcoming work and resource dates
• To validate and update data such as: start and end dates for projects, status, and ETC’s
• And to close out work requests

This is accomplished by walking through the Project Scheduling Reports and performing the following steps, while allowing for plenty of conversation.

• ETC report and resource overview. This provides a quick FYI review of overall load of project work.
• Validate the end dates and status for Projects that are scheduled and in progress.
• Validate the start and finish dates for ITPC and AITS and PPMO projects that are in the To Be Scheduled queue
• Communicate the ITPC projects that have been submitted for review.
• Review and add to the Future projects list. Get commitment on who owns proposal creation for these if applicable for any new items.
• Review work requests that have not been assigned by the manager and request assignment.
• Review cross functional and technology work requests that are completed by the assignee but not marked as done by the manager.

The desired outcome of this meeting is a shared understanding of current and upcoming work and a more accurate set of data about this work in Clarity.
Available resources
In flight project priorities

Active projects are prioritized by the AITS Managers on a monthly basis. This internal document should help us answer the question: What should I work on next? These priorities should not be interpreted as a mandate that staff only work on their critical project tasks. These priorities should be used to help resolve conflicts that occasionally arise between projects and ensure that we make work decisions aligned with AITS’ priorities.

1-CRITICAL: This project is a critical priority. Any resources required for timely completion should be allocated. This may mean that other projects will lose resources or will slow down. Requests by the project manager for resources to complete specific critical path tasks with a well defined start and end date and deliverables should be granted. Any impediments to progress should be communicated to senior management.

2-HIGH: This project is a high priority. Any resources required for committed to a critical priority project. The availability of increased to stay on track. Any impediments to progress should be communicated to senior management. Any projects have at least two of the priority project characteristics listed below.

3-NORMAL: This project is a normal priority. Critical and High priority Any delays in the project schedule should be communicated to senior management. Any projects have at least one of the priority project characteristics listed below.

*Priority project characteristics: high profile; high risk; significant impact; significant cost savings; support of senior level University stakeholders; deadline depends on a project with a critical priority value; demonstrates significant improvements; capable cost savings; directly supports one of the internal projects; Improve Ease of Use, Improve Speed to Serve, Collaborate.*
Other tools

**TIME TRACKING TOOLS**

- Individual time entry through a time tracking tool (Clarity PPM)
  - Actuals out to projects
  - Actuals impact estimated time to complete
- Manager estimation method once a month
- Improve scheduling and estimates
- Understand real capacity

**PPM TOOLS**

- Clarity PPM
- Planview
- HP PPM
- MS Project Server
- Primavera
- Sciforma
- Minimum data: status, schedule, effort & resources
Challenges

Data  Estimating  Resistance  Authority  Communication
Our lessons / experience

- All PMO’s in scheduling
- Empowered Portfolio Manager
- Clear hold policy
- Scheduling prep
- Limit projects in progress
- Include additional topics
Monitor and Control Portfolio

**HOW ARE WE DOING?**

- Monthly reviews with project managers
- Budget; Schedule; Barriers; Risks and Issues; Overall status; Baseline
- Identify projects at risk
- Manage stage gate process
- Report on project and portfolio performance
- Communicate

**Monitor and control portfolio**

- Report on performance
- Monitor performance and make adjustments

Ensure project success

Facilitate ITG

Manage portfolio

Manage resources
Tools

- Project reviews
- Performance reporting
- Risk monitoring
- Checklists
Project Reviews and 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 customers.
The 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 or enhancement.
- **Integration and Interfaces**: These are new feeds to a Banner that are small in nature and do not involve significant application development.
- **Maintenance**: These are projects that are used for tracking time for ongoing maintenance on high priority applications.
- **Upgrades**: Any upgrade to an in-house application or a vended application is categorized as an upgrade.
- **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 Review under General.
- Must have tasks following the template for the Initiation, Planning, and Closing VBS structure. Custom the Execution section is allowed but must have a good reason as to why it is not following the template structure.

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Challenges

Data
Estimating
Buy In
Authority
Active Management
• Improve portfolio and project performance through effective project management
• Increase chances of success for complex, large, or at risk projects
Tasks

• Develop and maintain standards and tools (PMLC, SDLC, Program Management)
• Build PM capacity
• PM responsibilities
• Manage and coordinate the use of a portfolio management and project management tools
Standards

• Project management standards (PMLC)
  ○ Created by stakeholders; owned by PMO
  ○ Enforced via reviews, reporting, and training

• Other domain specific standards (such as SDLC)
  ○ Created and owned by stakeholders (not PMs);
  ○ Enforced via monthly reviews, training, and PMs

• Large project / program management standards
  ○ Standard evolved through experience; owned by PMO
  ○ Large project / program management plan template
Responsibilities

- Initiating the project
- Planning the project
- Ongoing monitoring and controlling
- Managing schedule
- Task management
- Team management

- Communication coordination
- Facilitating meetings
- Facilitating conflicts
- Sponsor communication
- Managing scope, budget, changes
- Recording and facilitating decisions
Tools

Collaboration tools

Reporting tool

PPM tool

Time tracking process or tool
Challenges

- Common understanding of project manager role
- Lack of authority for project managers
- Uncooperative functional managers
- Lack of discipline / personality culture for PMs
- May have inexperienced project managers
- Resistance to baselining
- Ownership and adherence to domain specific methodologies
Our lessons/ experience

- Advising over auditing
- Team building and practice
- Team members develop methodology
- PM community
Portfolio Management Goals

**GOVERNING BODY**
- Portfolio management provides services to-

**PERFORMING BODY**

Center of excellence for project management
- Improve performance
- Provide support

Ensure project success

Facilitate ITG
- Facilitate governance
- Communicate Priorities.

Manage portfolio
- Monitor and control portfolio
  - Report on performance
  - Monitor performance and make adjustments

Manage resources

Facilitate ITG

Resource management and scheduling
- Manage expectations
- Justify staffing
- Manage workload
- Schedule work
Models

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

- **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

All PPMO’s require a portfolio manager to do these things. Some variation exists in how this is staffed and tasks.
Group Interactive Activity

Design your PPMO

1. Walk through the main functions of portfolio management and consider how they would be configured for your organization. (10 min)
2. Discuss your design with your colleagues. (20 min)
3. Large group discussion (15 min)
Implementing a PPMO

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
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

- Starts with the PMBOK definition and then customized to the work in your organization by applying a number for hours and/or dollars

- The numbers are a guideline
  - A small effort could always be managed as a project
  - Judgment call as numbers are not a hard cut off
    - Dealing with initial estimates
    - Ballpark idea of what level of effort is involved
Project Definitions

WORK REQUESTS

- Total budget: < $100K
- Hours of effort: < 850

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
Project Fields

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

<table>
<thead>
<tr>
<th>Mandatory Project</th>
<th>Functional Area</th>
<th>Project Type</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Yes</td>
<td>• Finance</td>
<td>• Analysis</td>
<td>• Strategic Initiative</td>
</tr>
<tr>
<td>• No</td>
<td>• HR</td>
<td>• Application Development</td>
<td>• Cost Savings</td>
</tr>
<tr>
<td></td>
<td>• Student</td>
<td>• Enhancement</td>
<td>• Internal Labor Efficiency</td>
</tr>
<tr>
<td></td>
<td>• BI</td>
<td>• Upgrade</td>
<td>• Improve Customer Service</td>
</tr>
</tbody>
</table>

- Identify basic project status data: name, id, PM, start and end date, level of effort, status comment.
After defining a project and the initial set of fields to be used, conduct the interview.

1. Gather lists of work from each area.
2. Identify which are projects.
3. Then review list with the organization to identify any missing items.
Assign ownership

PMs to the identified projects

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

from upper management for reporting on projects
Time Reporting

• 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

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Project proposal / review

- 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
Reporting

- 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
## Simple reports at first

<table>
<thead>
<tr>
<th>Project ID and name</th>
<th>Project manager</th>
<th>Level of effort (low, medium, high)</th>
<th>Date Started</th>
<th>Anticipated End Date</th>
<th>Status as of</th>
<th>Status comment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Project ID and name</th>
<th>Approval Date</th>
<th>Priority</th>
<th>Description</th>
<th>Anticipated start date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>
Prioritization / Scheduling

• **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
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 Models

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

- **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

All PPMO’s require a portfolio manager to do these things. Some variation exists in how this is staffed and tasks.
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
- Identifying States: starting state and end state

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Develop standards

- 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
Project Management Toolkit

This site outlines a shared project management methodology for the central IT organizations of the University of Illinois. It was produced as a collaboration between IT project managers within ACCC, AITS, CITES, ETS, and LABR, and project managers used by central initiatives.

The project management methodology provides standards that are aligned with the IT portfolio, project, and operational projects, as well as standards for performance and process improvement. This methodology is typically implemented as a functioning as a portfolio management process, and it provides a recommended set of processes and artifacts that are required for the portfolio management process. The detailed project management process is described in the Project Management Office (PMO) and Project Management Office (PMO) website.

### Recommended project artifacts by phase

<table>
<thead>
<tr>
<th>Phase</th>
<th>Required</th>
<th>Highly recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>Originating</td>
<td>Project Proposal: A project proposal includes: description of the work, business case, alternatives considered, impact of not doing the work, project management plan, and strategic alignment. A project proposal template is available on this site.</td>
<td>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 project charter template is available.</td>
</tr>
<tr>
<td>Initiating</td>
<td>Project charter: The project charter acts to define a number of key project elements including a project description, scope definition, and roles/responsibility definition. A project charter template is available on this site.</td>
<td>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.</td>
</tr>
<tr>
<td>Planning</td>
<td>Communication plan: The Communication plan is created by the project team early in project to indicate their agreement on how the project will communicate important information during the project's status meetings, issues, deliverables access, and design/development reviews. It's recommended that this plan is completed early enough to be included for review at the Project Kickoff Meeting. A starter communication plan is available on this site.</td>
<td>Project stakeholder analysis worksheet: A worksheet to be used by the project manager to ensure all important stakeholders are assessed for completing the communication plan. This document should not be distributed. A starter project stakeholder analysis worksheet is available on this site.</td>
</tr>
</tbody>
</table>

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#EDU17
Build the PMO

• Like minded folks to maintain and use the methodology
• Offer training and professional development activities
• 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
Supporting your PMs

- Training
- Coaching
- Reviews
- Audits and close supervision
- Culture
- Job aids and checklists
- Don’t overwhelm folks

- Talking points for hard conversations
- Core people invested
- Engage HR resources
- Minimize isolation
- Actively use social media tools and IM’ing
- Practicing

Don’t overwhelm folks with too many conversations. Ensure that the core people invested are engaged. Minimize isolation by actively using social media tools and IM’ing.
Quality control

- 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
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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.

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PMO Reviewer Full Checklist

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<tr>
<th>Tab/Page</th>
<th>Clarity Field/Process</th>
<th>PMO</th>
<th>PM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Summary Page</td>
<td>Start Date</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Project Summary Page</td>
<td>Finish Date</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Project Summary Page</td>
<td>Progress</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Project Summary Page</td>
<td>Requested Implementation Date (not required for Analysis and Maintenance Projects)</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Project Summary Page</td>
<td>Current Implementation Date (not required for Analysis and Maintenance Projects)</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Project Summary Page</td>
<td>Stage</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Project Summary Page</td>
<td>Document Location (Optional)</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Project Summary Page</td>
<td>As Of Date</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Project Summary Page</td>
<td>Status Comment</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>

Team Tab
- All generic roles have been replaced or removed

Task Tab
- Open tasks do not have a finish date in the past
- Tasks with start dates in the past but that have not actually started can still be completed on time.
- Tasks that are complete must be marked closed, ETC’s set to zero, 100% complete, and Open for Time Entry is unchecked
- ETCs and resource assignments have been updated for remaining work on tasks
- Tasks that will be starting soon have the correct resources assigned to them and they are open for time entry
- Check with the PM that risks and issues have been logged and assigned in Clarity
- Ensure that the project has been baselined
**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
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 your data

• We recommend one system for PPM and another system for team collaboration
• 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:
  o CA Clarity
  o Planview
  o 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.

• Can set up a standard template for projects that have all the standard PM artifacts. Can be used to enforce the process.
• Trello also works well, but it must be paired with a document storage and versioning tool such as SharePoint or Box.

SHAREPOINT
The goal of this project is to modernize the Identity and Access Management capabilities of the University, and to reduce the cost and complexity compared to the current IAM solution. Reducing complexity will allow the University to have a better handle over people information stored in the various systems and improve the overall security.

**Announcements**

**IAM All Team Meeting - April**

By Pollard, Mark

In case you missed the April all team meeting, here is the presentation.  
[IAM_All_Team_Update-April14.pdf](#)

**All IAM Team Monthly Update - March**

By Pollard, Mark

In case you missed the March update, attached is the presentation.  
[IAM_All_Team_Update-March14.pdf](#)

**Change to SiteFinder Authentication Page**

By Pollard, Mark

On Thursday, February 20 starting at 5:00 pm, ATIS will be making a minor change to the look of the SiteFinder Authentication pages. At the bottom of the SiteFinder authentication page, is a Powered by CA SiteMinder logo. We will be removing this...

**IAM All Team Monthly Update**

By Pollard, Mark

Don't forget Wednesday, February 5, 2014 we have our IAM All Team Monthly Update. This monthly meeting is an all team update for the IAM project in order to promote cross-functional communication among the IAM implementation teams and to provide consistent...

**IAM All Team Meeting Q and A**

By Pollard, Mark

After the IAM All Team meeting on November 5, there were several questions sent in. This document has the list of questions and their associated answers. If you have additional questions, please send them to your Team Lead or Mark Pollard.

**More Announcements...**
Group Interactive Activity

Plan Implementation

1. Review the recommended implementation steps for portfolio management. For each phase, think about the participants and a rough timeline for creating and evaluating your PPMO. (10 min)
2. Discuss your draft plan at the table (10 min)
3. Large group discussion (10 min)
Project Management Overview

Origination | Initiation | Planning | Execution | Closing
Project Management Lifecycle (PMLC)

- **Origination**
  - Proposing, justifying and approving a project

- **Initiation and Planning**
  - Defining and planning a project

- **Execution**
  - Getting the work done

- **Closing**
  - Clean up and hand off to support
PM’s Effort throughout the PMLC
Origination Phase

GOALS

Transform project ideas to a documented business case and project proposal for review and approval.

PM’S MISSION

Data gathering and support for the business case and project proposal (as requested).

HOW YOU CAN HELP

Support quality project proposals, emphasize the need for good starting estimates and analysis.
Initiation phase

**GOALS**

Develop the project charter and communication plan. Formalize and communicate goals, deliverables, participants and roles.

**PM’S MISSION**

Requires courage and good communication (plus a lot of work)

**HOW YOU CAN HELP**

Communicate, cheerlead, emphasize the importance of project chartering process and participating in project scope discussions.
Planning Phase

**GOALS**

Develop a detailed and complete work plan. This includes finalizing tasks, assigning resources, setting schedules, and gathering estimates.

**PM’s MISSION**

Requires courage, patience, and a lot of work.

**HOW YOU CAN HELP**

Help gather estimates, allocate resources, and communicate the importance of proper project planning.
Execution Phase

**GOALS**
- Do the work!
  Execute, monitor, and control the project plan.
  Execute, monitor, and control the communication plan.

**PM’s MISSION**
- Requires discipline to monitor and control and communicate and adjust.

**HOW YOU CAN HELP**
- Being available to the project manager, helping resolve resource issues, advocating for project priorities, advertising progress and successes.
Closing Phase

GOALS

Tie up loose ends, hand off results, assess project performance and release team.

PM’S MISSION

Requires discipline. The end of this project will impact the beginning of the next!

HOW YOU CAN HELP

Congratulate project team and advertise success.
Questions and Discussion
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.

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Kelly Block: kjb@uillinois.edu
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