Portfolio Focused PMO: College of Medicine- Tucson’s Plans

Presented By:
Winie Blumenkron, M.S., PMP, CSM
Mary Vega, M.Ed., CSM
A Little About Us

Winifred C. Blumenkron, M.S., PMP, CSM
Project Manager
COM - Information Technology Services

Winifred currently oversees the Project Portfolio Management Team, and is responsible for maintaining and managing the College’s Project Management Methodology and Best Practices. Winifred holds a Master’s degree in Demography from the University of Puerto Rico and a Master’s Certificate in Project Management from the George Washington University. She is also a certified PMP and a certified Scrum Master.

Mary A. Vega, M. Ed, CSM
Director of Enterprise Applications and Project Portfolio Management
COM - Information Technology Services

Mary currently leads the Enterprise Applications and the Project Portfolio Management Office, and is responsible for defining application architecture, setting priorities and managing the required resources to successfully meet the critical and varied application and project needs of the college. Mary holds a Master’s degree in Human Relations from NAU and is a certified Scrum Master.
What We Would Like to Share

- Why the Portfolio Focused PMO came to be
- Our Vision, Mission, Goals and Objectives
- How we measure success
- Our IT governance
- Techniques, tools, and things we have learned
Why the Portfolio Focused PMO Came to Be

- The changing landscape with fewer resources
- Technology has an important role in our daily lives
- As we transformed the number of IT projects increased WAY beyond a manageable level
- It is difficult to act on projects without a clear picture of a prioritized list
- We need transparency and understanding
Our Charge

- Establish a process (standards and best practices) to prioritize, plan, and execute IT projects successfully
- Leverage cross-functional teams
- Be successful in supporting the University’s mission and goals by completing projects on-time, under budget, and in scope
- Increase the quality and end-user satisfaction
- Increase the frequency of completed projects
Our Vision, Mission, Goals and Objectives

Vision: Successful IT Projects

Mission and Guiding Principle
“The success of the PMO is derived from the success of its customers”

Goals and Objectives
• Deliver successful IT projects
• Keep Management and Project community informed
• Develop and support a project management methodology and best practices
Our Operating Philosophy:

- Apply outstanding and consistent Governance, Alignment, and Communication techniques.
- It’s one thing to do a project right, it’s another to do the right project (Levine, 2005).

Areas of Focus

- Improved Customer Satisfaction
- Job Enrichments/Job Empowerments
- Communication
- Improved Image
- Reduced Risk
- Financial Benefit
- Quality Improvement
The goal: ensure the results of a project meet the strategic requirements of the college, AHSC, and ultimately the university.
**Tools and Techniques**

**Techniques**

- A consistent approach to planning and managing projects is implemented across COM-IT projects
- Internal Project Management training is provided at all levels
- Project Management is recognized as a core competency (i.e. as part of the COM culture)
- The PPMO’s balance between project support and control functions is defined and communicated to ensure that departments understand what is expected of them and what they should expect from the PPMO
- The PPMO leverages industry standards and best practices
- COM defines its strategy; the PPMO focuses on those projects central to realization of the strategy
- The PPMO adjusts its operations based on continuous customer feedback
- The PPMO designs a scalable Project Management system (process and tools)
- COM recognizes that some groups and individuals will embrace project management change better than others

**Tools**

- SharePoint 2010
- Templates
- Microsoft Project for Planning
- Agile Approach
  - Scrum Burndown Chart
  - Kanban Board (investigating)
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## MS Project - The Planning Tool

### Project Timeline

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<td>Oct 16/14</td>
<td>Dec 30/15</td>
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<td>Oct 16/14</td>
<td>Dec 30/15</td>
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<td><strong>SharePoint for Student Affairs</strong></td>
<td>Oct 16/14</td>
<td>Dec 30/15</td>
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<tr>
<td><strong>Projects Under Review</strong></td>
<td>Oct 16/14</td>
<td>Dec 30/15</td>
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<td><strong>Com-Pipeline</strong></td>
<td>Oct 16/14</td>
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<td><strong>UA Vitae</strong></td>
<td>Oct 16/14</td>
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<td><strong>Projects Under Conceptualization</strong></td>
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### Task Details

- **Compliant Research Data Environment**
  - Start: Mon 6/2/12
  - Finish: Wed 6/30/15
  - Duration: 1180 days

- **New Projects Requested**
  - Start: Mon 6/2/12
  - Finish: Fri 10/7/16
  - Duration: 512 days

- **Compliant Research Data Environment**
  - Start: Mon 6/2/12
  - Finish: Wed 6/30/15
  - Duration: 1180 days

- **New Curriculum Tagging**
  - Start: Mon 7/15/13
  - Finish: Tue 12/31/14
  - Duration: 512 days

- **Psychiatry: Tillgren’s SCAN lab**
  - Start: Mon 7/15/13
  - Finish: Fri 10/7/16
  - Duration: 512 days

- **SharePoint for Student Affairs**
  - Start: Mon 11/18/13
  - Finish: Wed 12/31/14
  - Duration: 512 days

- **Projects Under Review**
  - Start: Mon 10/6/14
  - Finish: Fri 10/7/16
  - Duration: 525 days

- **Com-Pipeline**
  - Start: Mon 10/6/14
  - Finish: Fri 10/7/16
  - Duration: 525 days

- **UA Vitae**
  - Start: Mon 10/6/14
  - Finish: Fri 10/7/16
  - Duration: 525 days

- **Projects Under Conceptualization**
  - Start: Oct 16/14
  - Finish: Oct 16/14
  - Duration: 334 days
Our Project Management Framework

### Project Management Framework

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<tr>
<th>Stage</th>
<th>Activities</th>
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| Idea Stage             | - Identify business need  
                       | - Idea is added to the project list  
                       | **Deliverables & Tools**  
                       | - Project list           |
| Conceptualization      | - Conducting feasibility study/cost benefit analysis  
                       | - Identify project sponsors  
                       | **Deliverables & Tools**  
                       | - Business Case  
                       | - Project list           |
| Initiation             | - Identify and secure funding  
                       | - Document project objectives  
                       | - Staff the project team  
                       | - Hold Kickoff meeting  
                       | **Deliverables & Tools**  
                       | - Project Charter  
                       | - Stakeholder Register  |
| Planning               | - Creating a release plan  
                       | - Assigning resources to tasks  
                       | - Creating a SharePoint site for the project  
                       | - Analyze business practices and procedures  
                       | **Deliverables & Tools**  
                       | - Task List  
                       | - Release Plan  
                       | - Requirements template  
                       | - BP document template  |
| Executing & Monitoring | - Hold status and project meetings  
                       | - Monitor project progress  
                       | - Submit project status reports and manage stakeholder relationships  
                       | - Perform tasks as assigned  
                       | **Deliverables & Tools**  
                       | - Meeting minutes  
                       | - Status reports  
                       | - Issue log  
                       | - Testing template  |
| Closing                | - Obtaining final approvals and sign-offs  
                       | - Invoking the archiving process  
                       | - Documenting and publishing lessons learned  
                       | - Verifying all project closure tasks are complete  
                       | - Celebrating success  
                       | **Deliverables & Tools**  
                       | - Lessons learned  
                       | - User guides  |
## Required Tools

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<td>Project Summary</td>
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**Legend**
- ✓: Required
- ✗: Not Applicable
- !: Optional
Our Project Lifecycle
## College of Medicine - Templates

### General Information
- Vendor List
- Application Support

### Documents
- Business Analysis Docs
- General IT Documents
- Templates & Guides
- User Guides
- Archived Project Docs

### Project Information
- Project List
- Help
- Wiki
- Permissions Audit Log

### Document Type: Guide (6)
- Document Type: Documentation Best Practices
- Effective Kickoff meeting
- Lessons Learned Methodology and Best Practices
- Presentation Template
- Project Life Cycle
- Required Documents

### Document Type: Template (15)
- COM_Analytics_Requirements_Template
- COM_Business Case Template
- COM_Business Procedures Template - short version
- COM_Business Procedures Template
- COM_Business Process_Template
- COM_Choice Management Document_Template
- COM_Database_Request_Form
- COM_Disposition_Template
- COM_Meeting_Agenda_Template
- COM_Meeting_Minutes_Template
- COM_OrgReadinessAssessment_Template
- COM_Project Charter_Template
- COM_Project Requirements_Template
- COM_Project Testing Scenario_Template
- COM_Project Summary_Template
- COM_Project Task_Log_Template
- COM_Roles_Responsibilities_Template
- COM_User Guide_Template
- COM_Status-Report-Template

Add document
Things We Have Learned

- Define a workflow request process for new project requests
- Confirm Strategic Alignment - Verify and Check it Twice
- Established a Governance Committee: identify key leadership to serve on Governance Committee
- Executive sponsorship for the process is paramount
- Communication, Communication AND Communication: process and results
- Meet regularly with leadership to discuss new projects, progress, and status
- Know your stakeholders
- Define the differences between operational work and project work for the organization
- Find and use a tool that works for you: Integration of PPM (Project Portfolio Management) / PMIS (Project Management Information System)
- “Every PMO must chart its own path.” ~ Craig Letavec, PMP, PgMP, Vice-Chair, PMI Program Management Office Community of Practice
CoM Poster Sessions

- SharePoint as a Project Management Information System (PMIS)
- Implementation of OASIS for Medical Student Course Scheduling
- The Application Process from Inception to Acceptance
- RegOnline