

## **Project Management Constituent Group Meeting – Educause 2005**

### **Portfolio Management – Discussion of how Portfolio Management is addressed at institutions.**

- Senior management meets to vet proposed projects, using rating criteria, risks, current conditions, financial impact.
- Use 3 common documents for inter-departmental for: project planning, tracking, and charter developed at Carnegie Mellon (Hetty Baiz [hetty@princeton.edu](mailto:hetty@princeton.edu))
- U.C. Davis in second year of portfolio management. CIO makes a call to peers, projects are discussed at the senior level, and IT makes recommendations to the Provost.
- Syracuse says that projects are managed similar to a stock portfolio reflecting near and long-term investments match against performance goals.
- New Hampshire – Executive management prioritizes, aligning with strategic goals.

### **Project Management Office**

- Discussion of whether PM's only work on enterprise projects – for some, these are the only projects they work on, for others IT infrastructure projects also are managed through the PMO.
- Princeton's PMO does not have a permanent staff of PM's. They join the office from other departments and are deployed to manage projects.
- Discussion of whether Business PM's are assigned – in some cases yes, and are partnered with a Technical Lead.
- One model to establish a PMO is to buy a methodology and establish it as a standard.
- Metrics to justify a PMO – Carnegie Mellon has research that shows that a competent PMO has a 75% success rate, versus 35% success rate of “seat of the pants” project management.
- Competencies include measuring project on the expected time-line, managing the project from end to end, and actively managing risk.
- There are examples of small units having a PMO.

### **Task Estimation**

One model is to have staff develop the estimates and then pad these estimates.

Some managers have problems establishing strict deadlines because of other work that comes in and interrupts project progress.

Some units struggle with staff availability which can be as low as 50% due to other commitments.

To demonstrate the time it takes to perform on these other commitments the suggestion was made to have staff track their time for two weeks. This can be used as evidence to other managers.

Another suggestion was to always do a post-mortem and review success with deadlines and other issues.

One school in Florida, renamed tasks to “self-inspired commitments” in order to establish buy-in from staff.

### **Integration of Management Tools – Help Desk, Code Migration, Project Plan, Developer assignment and tracking**

- UC Davis uses in-house software, which has not been completed to be fully functional.
- Share-Point is software linked to MS Project Server, and some are using this.
- Quickface by Intuit is used by some.
- Lotus Notes has been used as a gradual approach to introducing integrated tools.
- One observation, that integration is not a technical problem, but getting cooperation is the problem.
- BaseCamp at [basecamp.com](http://basecamp.com) was mentioned as another tool.

### **Project Buy In**

- Problem – how do you stop a techie from introducing a solution before the problem has been fully defined.
- Or, how do you stop the requestor from introducing a solution before the problem is generally understood.
- One model is to establish a Customer Relationship Manager whose role it is to be the active liaison between the two groups.
- One model is to use Business Analysts (and analysis) to help client articulate requirements and success criteria.
- CIO, in some institutions, takes responsibility for generating buy-in from the top-down.

### **Fledgling Project Managers**

- Check out Project Management Institute for classes.
- Gnathead.com
- Classes offered by extension programs.

### **Why Do Projects Fail?**

- Lack of business acumen at high level of management.
- Lack of shared goals.
- Lack of will to make decisions.

### **Miscellaneous**

Check out “Death by Agreements.

Use agenda driven meetings. For each issue on the agenda, have a Finding, an Analysis, and an Agreement section. Publish the minutes using this format. Very effective.