

# Project Management Symposium

## Using Strategic Portfolio Management to Transform IT Governance

**Erin Murtha**

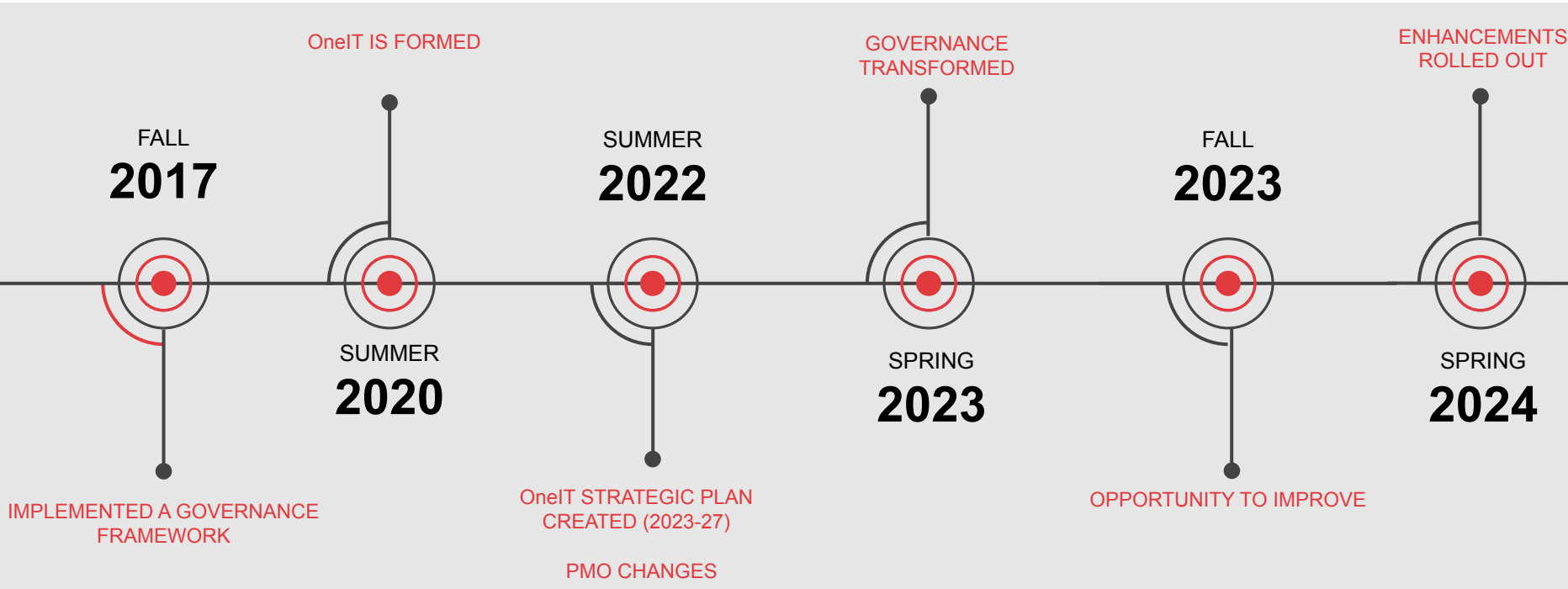
Asst. Vice Chancellor, Planning & Projects, OneIT  
University of North Carolina at Charlotte



**PROJECT MANAGEMENT  
CENTER FOR EXCELLENCE**

A.J. CLARK SCHOOL OF ENGINEERING  
Civil & Environmental Engineering Department

# IT Governance at Charlotte





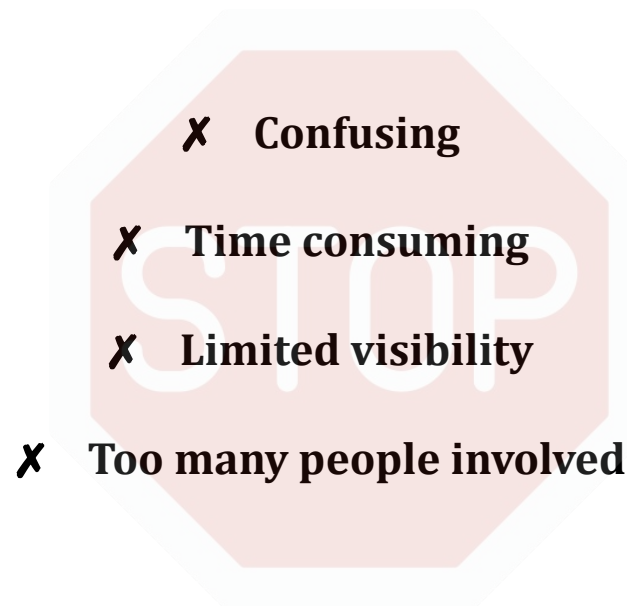
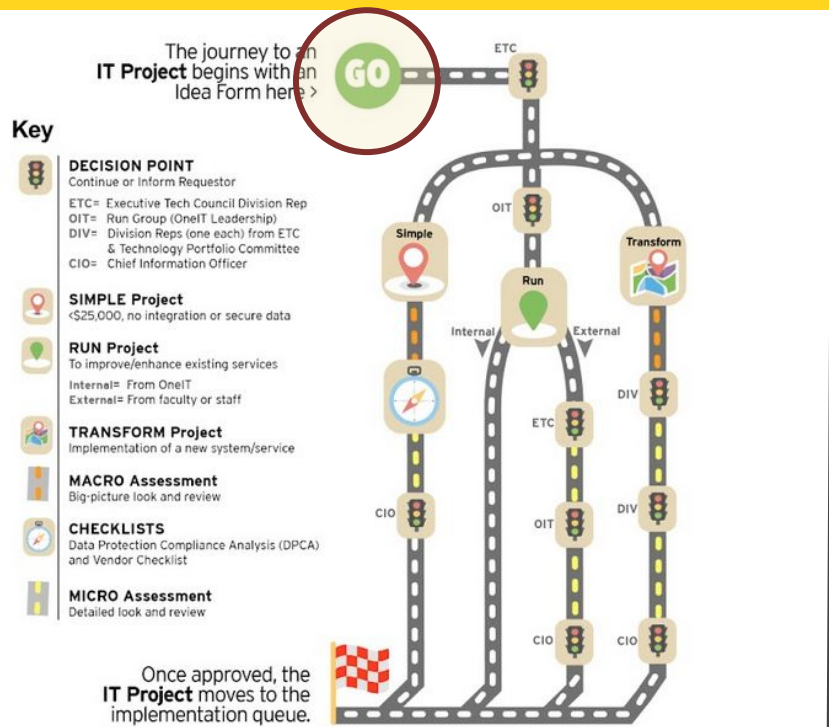
**Where We Started.**



# IT Governance: 2017 - 2022

## Process

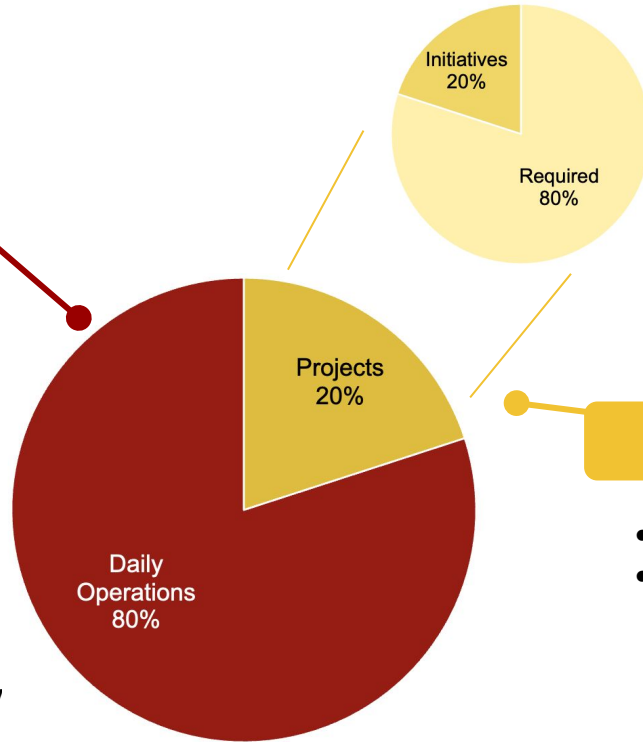
## Feedback



# Annual OneIT Engagement

## Daily Operations (80% of our time)

- **35,000 +** community members
- **550** services
- **300** systems
- **50,000** support tickets
- **15,000** managed devices
- **3000** servers
- **25,000** concurrent wireless connections
- **2,300** miles of cable
- **350 Million** blocked attacks daily

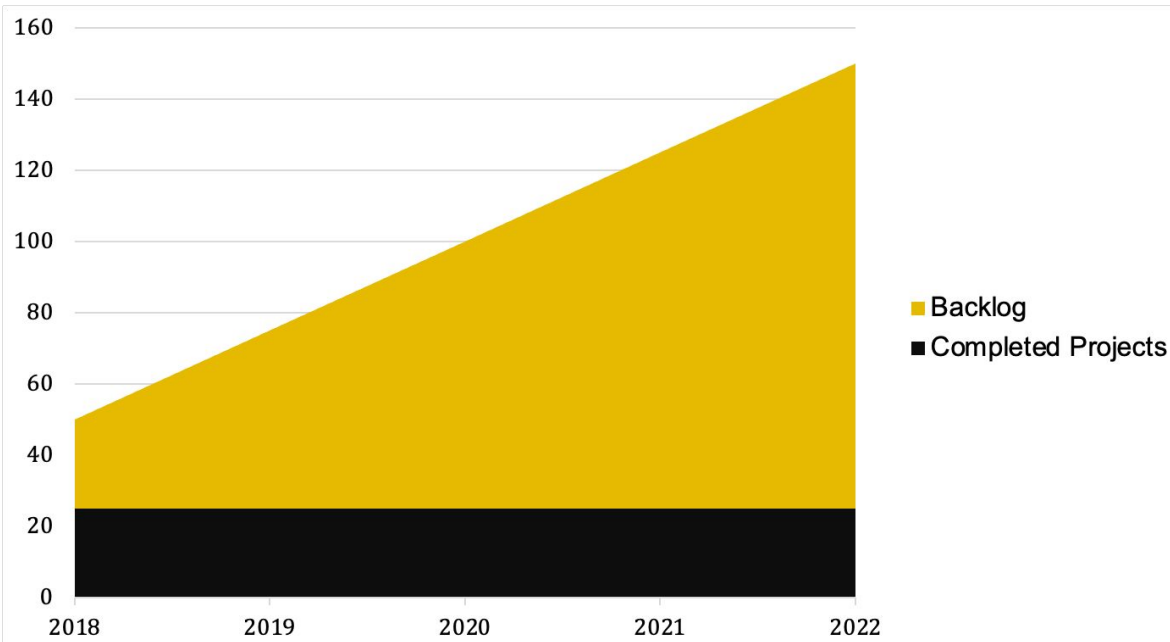


## Project Support (20% of our time)

- **100** required projects
- **25** University initiatives



# Impacts of Former Process



## Snowball Effect

All projects are treated the same



Absence of grooming the backlog



Lack of project prioritization



Unwieldy backlog





**“We have promised to do fewer things better.”**

*Dr. Sharon Gaber, UNC Charlotte Chancellor*



# **IT Governance Transformed.**





# Research

## Explored Current Process

Connected with **over 100** stakeholders within and outside the UNC Charlotte community.

- *Facilitated sessions*
- *Conducted surveys*
- *Ad-hoc conversations*
- *One-to-one meetings*



THE UNIVERSITY  
of NORTH CAROLINA  
at CHAPEL HILL



UNIVERSITY OF  
MICHIGAN



HARVARD  
MEDICAL SCHOOL



PennState



PRINCETON  
UNIVERSITY



THE UNIVERSITY OF  
TOLEDO



WISCONSIN  
UNIVERSITY OF WISCONSIN-MADISON



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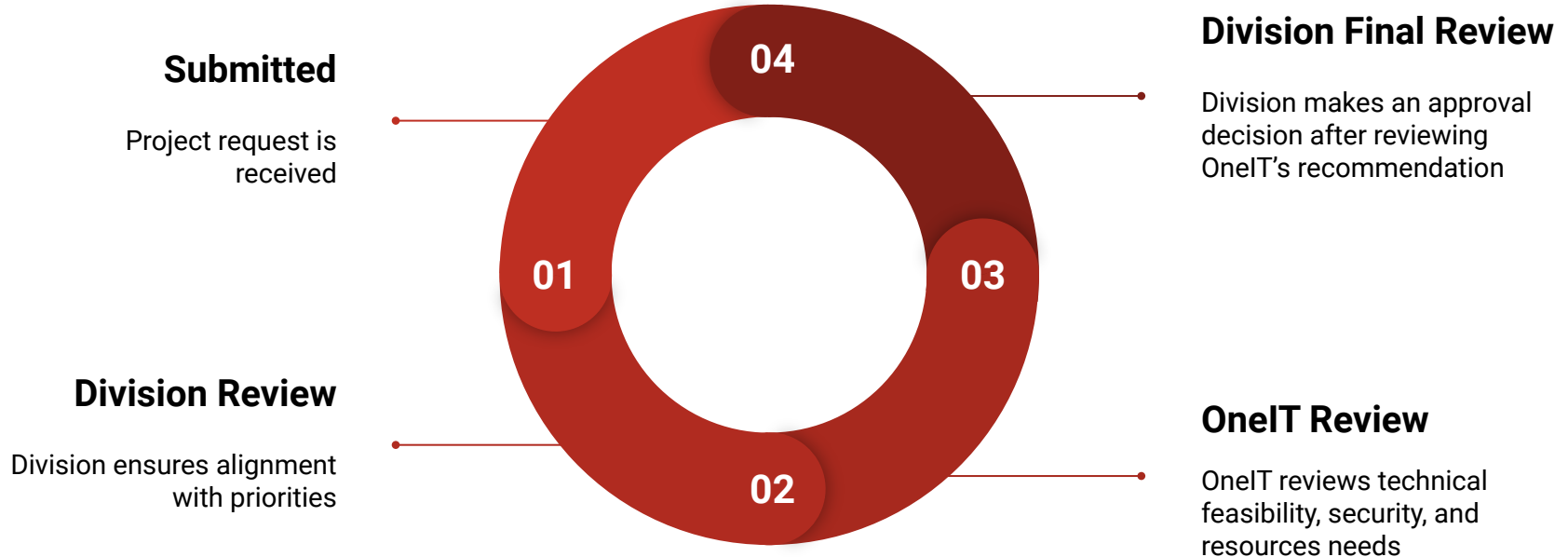
# What is a Project?

- A unique endeavor (not repeated)
- Temporary with a distinct beginning and end
- Defined by specific deliverables
- Convened team collaborates on scoped work
- Exceeds 80 hours of effort
- Main project types
  - University initiatives
  - *Operational (optional and must-do)*
- Internal or non-internal





# Request Review Cycle





# Project Progression

## Approved

- Division assigns a priority within target numbers
- Work is approved to begin when resources are available

## Planning

- Project team is assembled
- Project charter is completed, documenting scope, objectives, and requirements
- Charter is approved by sponsor via DocuSign

## Executing

- Resources are allocated to identify, schedule, and implement needed tasks for each milestone
- Regular reporting

## Monitoring

- Final testing is completed
- Remaining technical issues are resolved

## Completed

- Project closure document is completed
- Sponsor validates that the project objectives were successfully met





# Values

*Becoming more agile and adaptive*



Transparency



Make it easy



Data informed decision making



Strategic project portfolio for the University



Communication



Stakeholder partnerships



# Our Steps



Changed the culture



Defined critical roles



Implemented a PPM solution



Standardized project intake, review & approval





# Culture Change



Engaged Chancellor's Cabinet



Executive Support



Executive Steering Committee  
appointment



Created Division processes to  
review and prioritize requests



Engagement in Call for Projects



Commitment to resource  
approved projects



# Defined Critical Roles

## Division Representative (Executive Steering Members)

- Strategic decision maker
- Understands the Division's business needs
- Ensures strategic alignment
- Authorizes funding
- Prioritizes projects
- Commits subject matter experts



## Executive Director (OneIT Liaisons)

- Advisory IT partner
- Understands the Division's business needs
- Understands broad technical architecture, available systems and integrations; aligns needs with technical capabilities
- Drives collaboration
- Informs the Division of project status





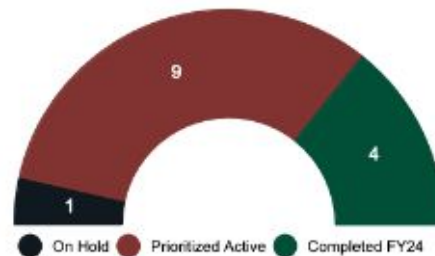


# PPM Solution

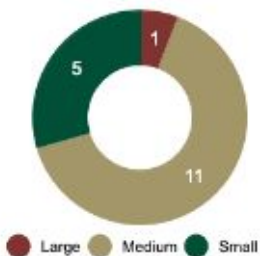
## Progress Against Division Targets



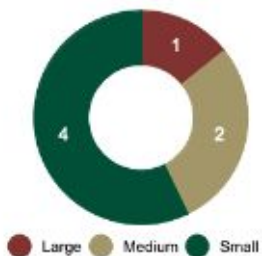
## FY24 Prioritized Projects



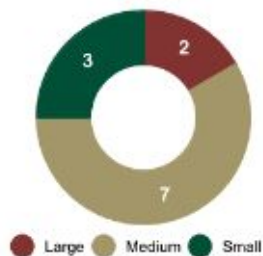
## Active & On-Hold Projects



## Completed Projects



## Deferred Requests



## FY24 - Internal Projects

Under Review	0
Approved	0
Active	4
On Hold	1
Completed	3

## FY24 Priority Exemptions (non-internal)

Under Review	0
Approved	0
Active	2



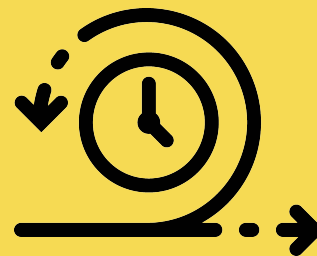


# Streamlined the Submission Process

**SEMI-ANNUAL CALL  
FOR PROJECTS**



**OFF-CYCLE PROJECT REQUESTS**



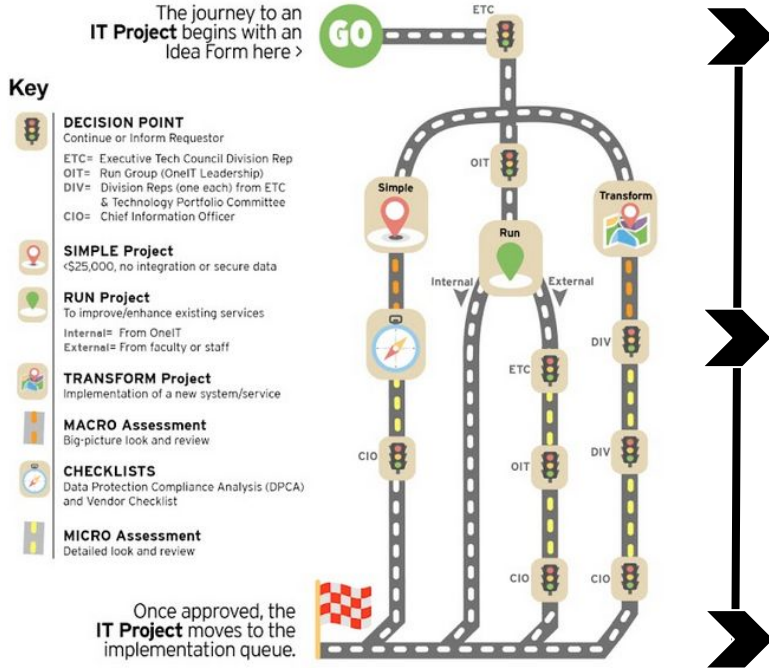


**Things got much  
better.**

# Streamlined Processes




2022

2023



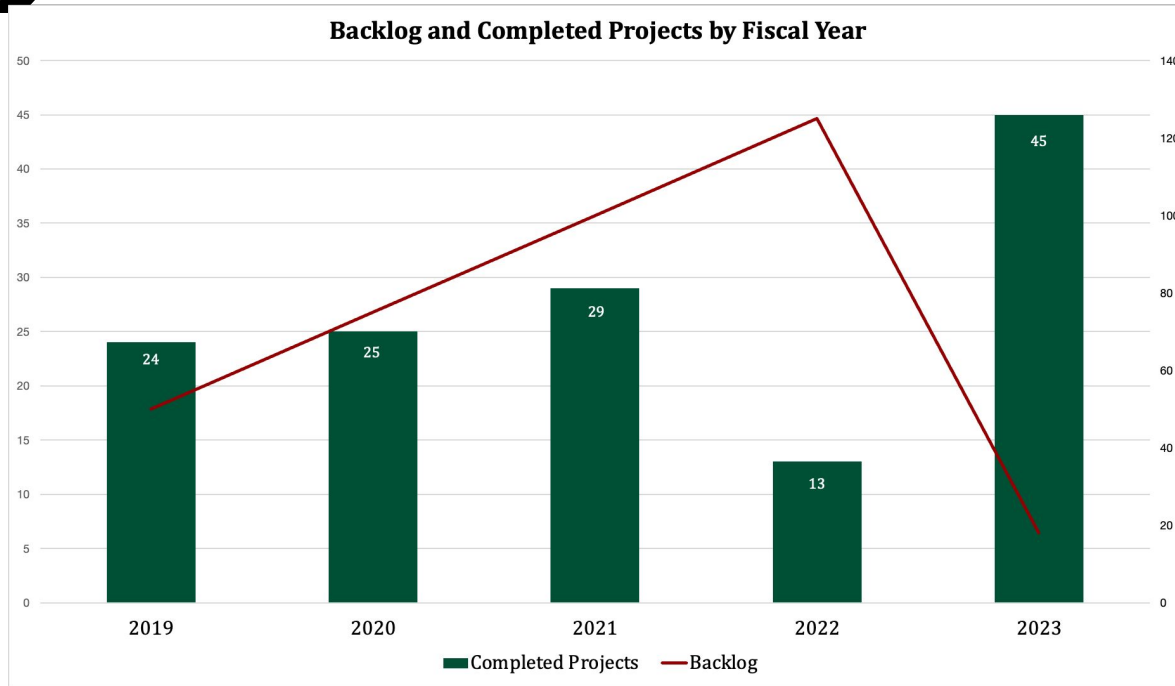


# Abbreviated Project Reviews

	<b>Micro Assessments</b>	<ul style="list-style-type: none"><li>• Completed during the Submitted phase</li><li>• Very large effort; often 20+ plus page documents</li><li>• Projects regularly denied or vanished</li></ul>
	<b>Feasibility Reviews</b>	<ul style="list-style-type: none"><li>• Completed during the OneIT Review Phase</li><li>• Medium/Large effort, average of 5 page documents</li><li>• Good information for Division to make approval decisions</li></ul>
	<b>Executive Summary</b>	<ul style="list-style-type: none"><li>• Completed during the OneIT Review Phase</li><li>• Minimal effort / auto-generated in Smartsheet as 1 page PDF</li><li>• Enough information for Division to make decisions</li></ul>



# Portfolio Management



## Impacts

More projects completed



Managed backlog



Increased visibility



Higher satisfaction



# Annual Project Targets

Division	Annual Targets	Completed in FY 2023
Academic Affairs & Colleges	23	22
Athletics	2	2
Business Affairs	17	15
Diversity & Inclusion	2	0
Institutional Integrity	2	0
Office of the Chancellor	4	1
Research	4	2
Student Affairs	6	2
University Advancement	2	1
<b>Totals</b>	<b>62</b>	<b>45</b>

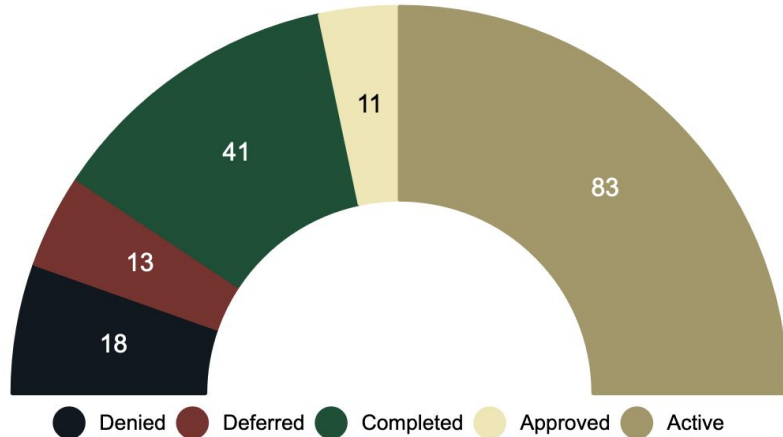
Some divisions elected not to submit project requests at their target numbers





# Projects Reviewed in 2023

## Collective Project Statuses



Data Captured 10-26-23

## Decisions by Divisions

### 166 Requests Reviewed

- **Denied:** request did no move forward
- **Deferred:** request will be considered in the future
- **Complete:** project has successfully concluded
- **Approved:** will begin when resources are available
- **Active:** current status is either planning, executing, or monitoring







**We are learning  
and improving.**



# Simplified Project Types

**Initiative:** new service/tool/solution or considerable impact or enhancements to an existing system or solution.

**Required:** projects required to meet compliance needs or to keep an existing system/system up and running.





# Streamlined the Submission Process

~~NOTE~~

ANNUAL CALL  
FOR PROJECTS

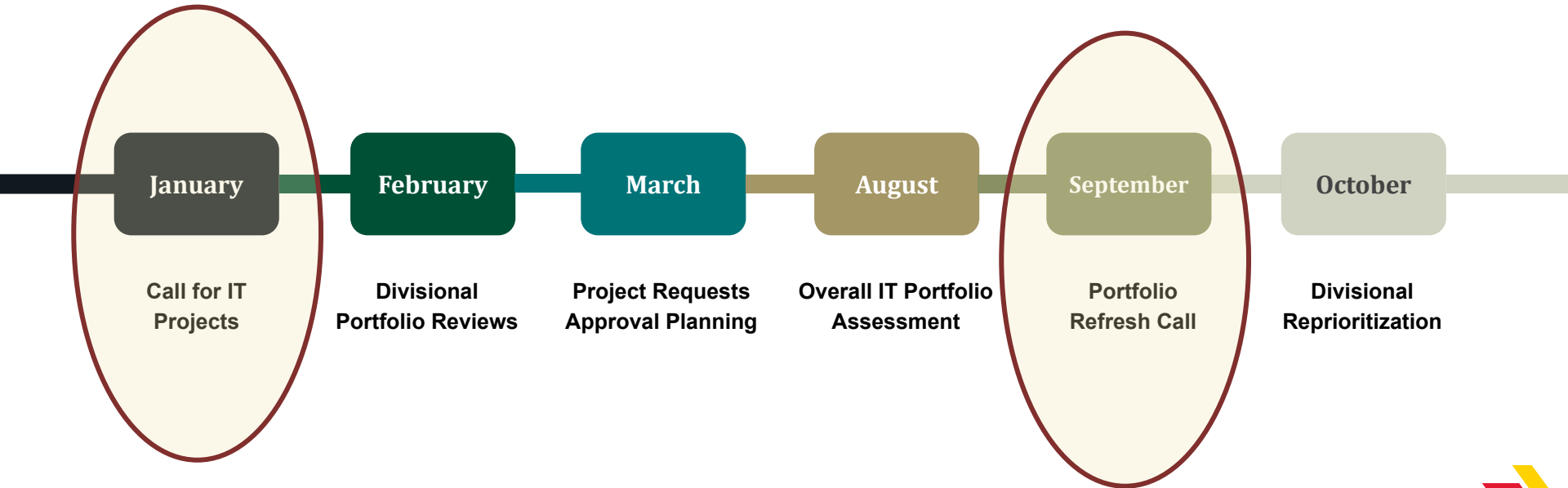


OFF-CYCLE PROJECT REQUESTS





# Enhanced IT Project Planning Process




# Enhanced Visibility

## AA - Approved Projects 1

Filter   

Div Priority Number	Number	Project Name	Status	Overall Health	% Complete	Sponsor
8	187	Electronic Employee Payment Request Form (EPR) – As an EPAF Re-Design	Execution	<span style="color: green;">●</span>	40%	Lori McMah
N/A	238	Student Location Compliance	Monitoring	<span style="color: green;">●</span>	95%	Jody Cebina
11	282	Email Aliases for Students	Planning	<span style="color: green;">●</span>	1%	Jon Reece
9	295	Salesforce & Marketing Cloud Digital Communications for Graduate Academic Affairs	Execution	<span style="color: green;">●</span>	5%	Katherine Ha
0	346	Transfer Credit Advisor Upgrade	Monitoring	<span style="color: green;">●</span>	99%	Jonathan Re



### 397 - Behavioral Threat Assessment Software

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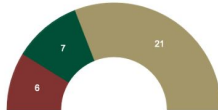
#### Project Information

**83%**  
Percent Complete

**12/14/22**  
Project Start Date

**09/27/23**  
Project End Date

#### Tasks by Status



● Not Started  
● In Progress  
● Complete

#### Project Name

**Behavioral Threat Assessment**  
Project Name

#### Behavioral Threat Assessment Contacts

- John Bogdan**  
Project Sponsor
- Ricky Barnes**  
Project Manager
- Heather Kloeker-Webster**  
Subject Matter Expert

#### Project Resources

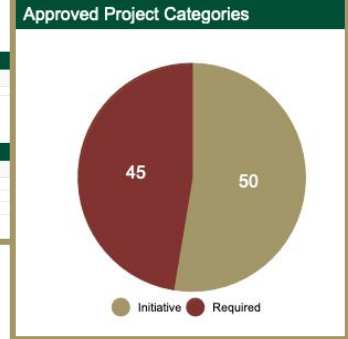
- 397 - Behavioral Threat Ass...
- 397 - Behavioral Threat Proje...
- Google Project Folder

#### At Risk Tasks

At Risk	Task Name	Assigned To	Status	Start Date	End Date

#### Project Milestones

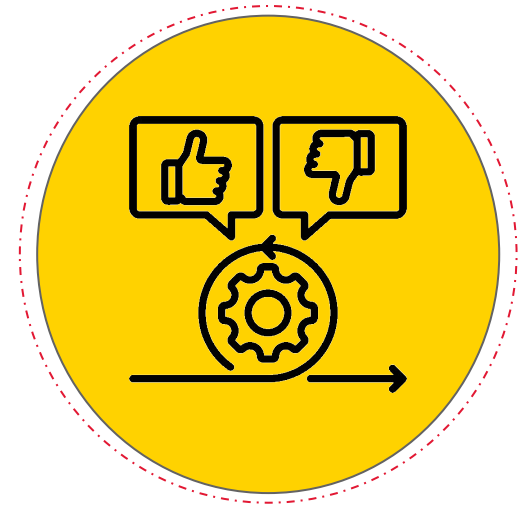
Task Name	Status	End Date	% Complete	Assigned To	Latest Comment
Project Approval	Complete	02/10/23	100%	Ricky Barnes	
Contract Signed	Complete	03/02/23	100%	Purchasing	208: Second round of approval sent over to Trever. This morning from Jade.
Risk-off Meeting Complete	Complete	03/09/23	100%	Ricky Barnes	
Implementation Complete	In Progress	08/17/23	50%	Navigals360	





# Baked more OneIT Feedback into the Review Process

- **Executive Directors** collaborate with Division leadership to review requests and offer initial approval recommendations
- Included **CIO recommendation** as part of the process

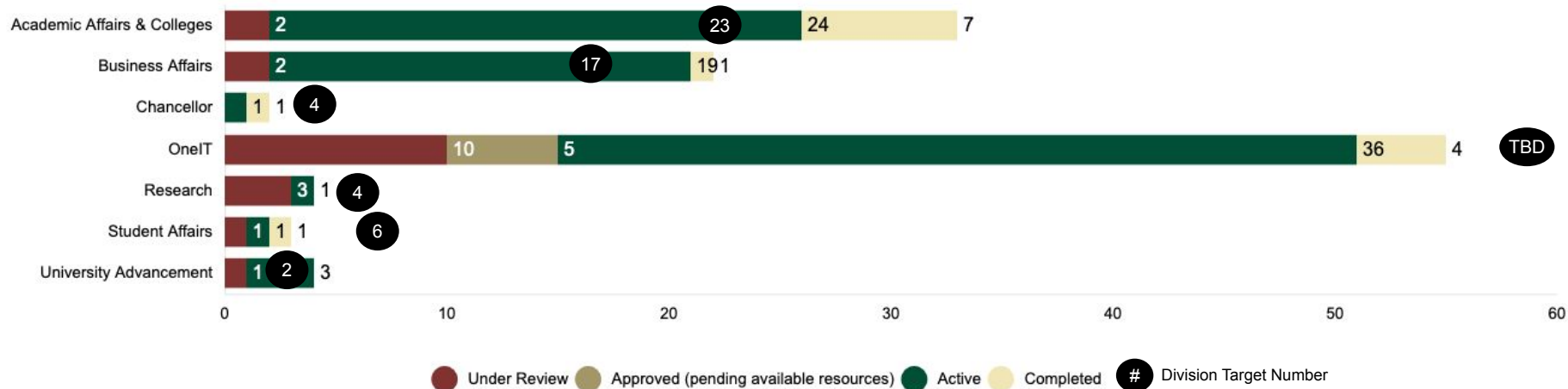




# Project Activity

Year-to-Date Activity Compared to Targets \*

## FY 2024 Progress Against Targets



\* Divisions may have more projects than their targets since many projects were active before governance transformed.





**We can still do  
better.**

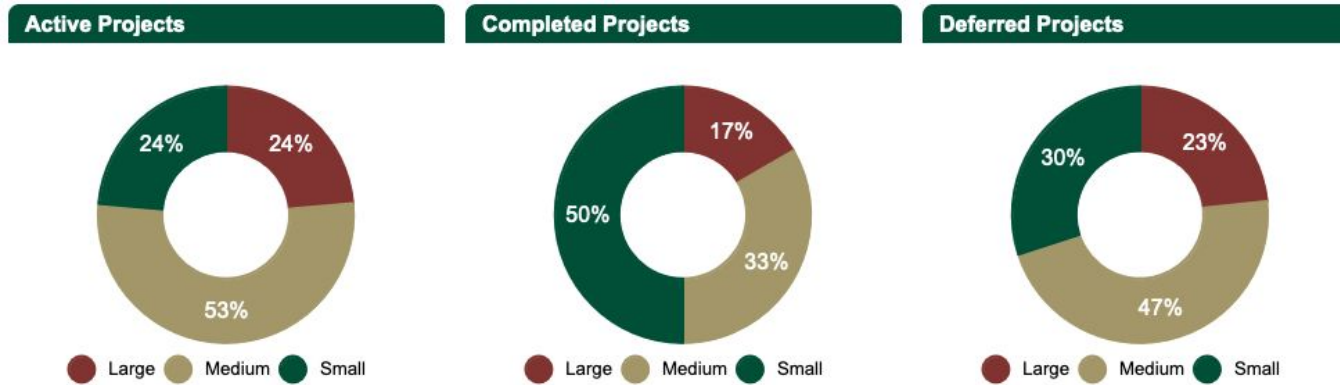




# Balance the Portfolio

- Project sizes are calculated as factors of complexity and resources required.
- A balanced portfolio consists of 50% small, 35% medium, and 15% large projects
- OneIT may suggest breaking medium and large projects into smaller subprojects

## YTD Metrics

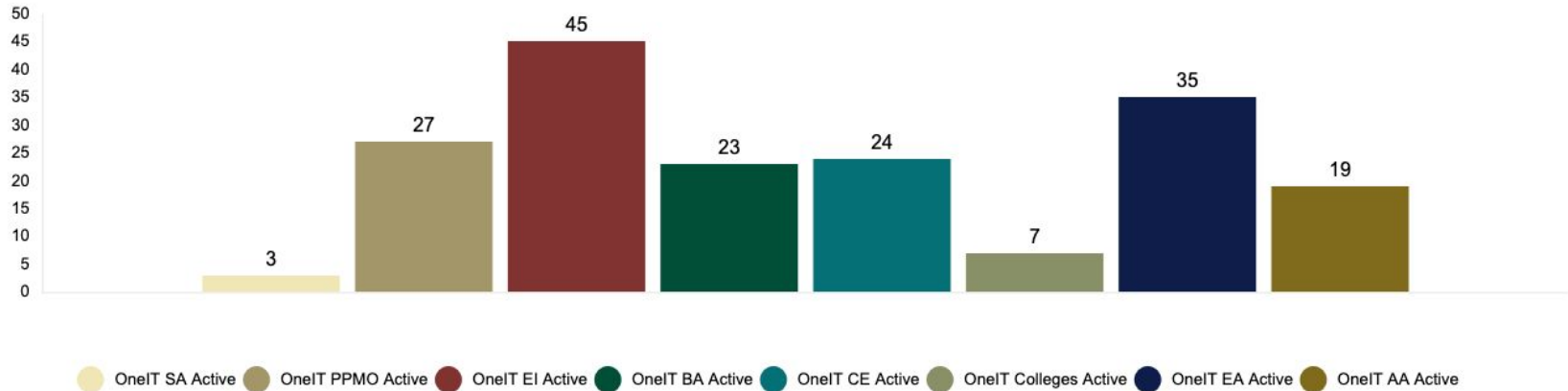




# Capacity Planning & Scheduling

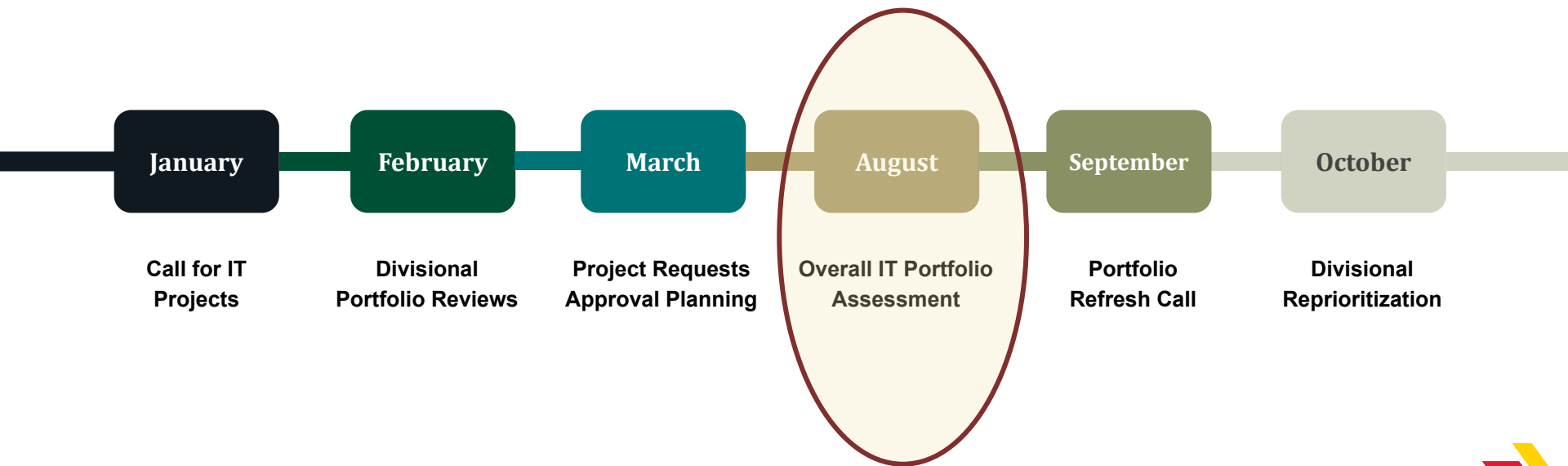
- Reduce the volume of active projects
- Develop a portfolio-wide kick-off schedule, factoring in resource availability

Engaged OneIT Resources: In-Flight Projects



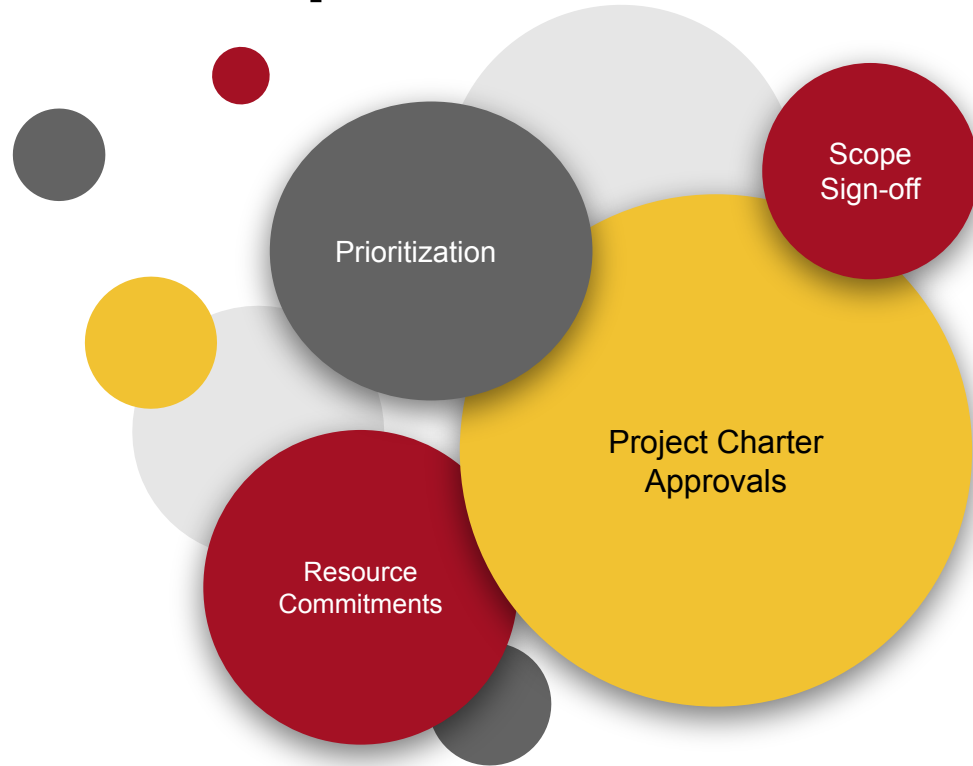


# Assess and Prioritize the Portfolio





# Committed Partnerships



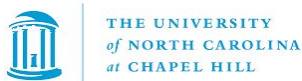


# Giving Back

## Becoming a Model

Connecting with the Higher Education community to share our model and lessons learned.

- *Conference presentations*
- *Poster sessions*
- *Engagement in Special Interest Groups*
- *One-to-one meetings*





# Let's Connect.

Erin Murtha

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