



# PROJECT STANDARDS AND GUIDELINES

A Guide to DTAS Project Management

## Abstract

This document defines our DTAS project management terminology and the outlines the standards and guidelines of our project management system. It will, like all good processes, be a living document and progressively elaborated as we mature in our project management efforts.

## Project Standards and Guidelines

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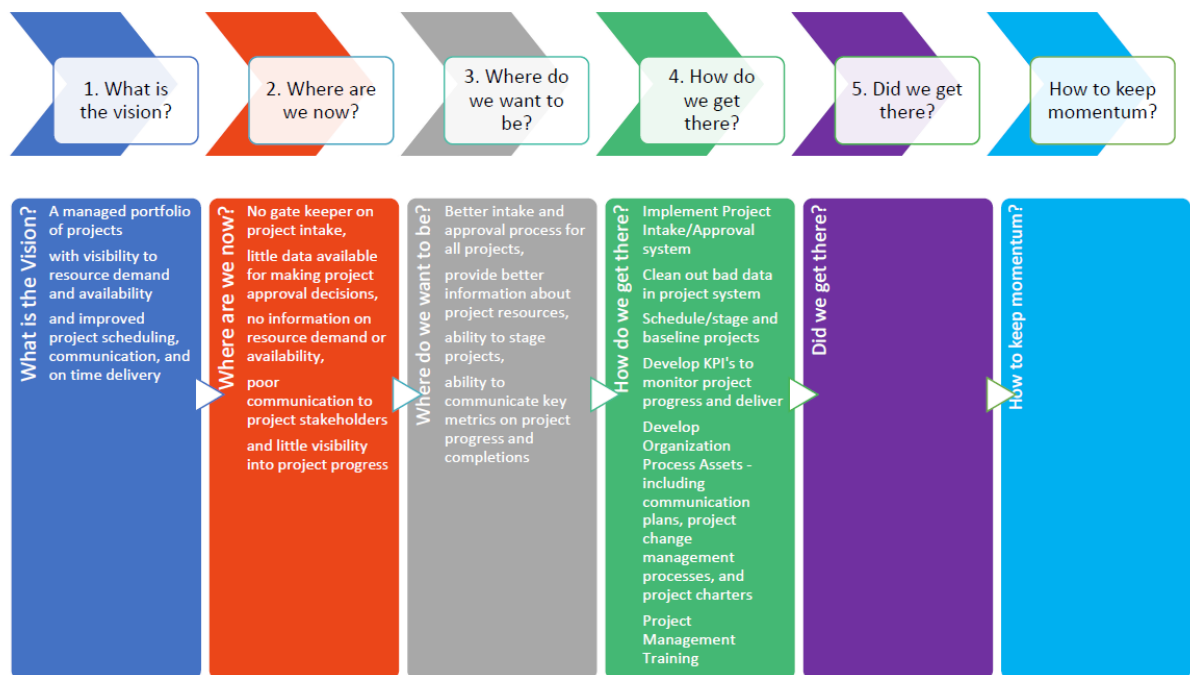


## Project Standards and Guidelines

The intention of this document is to publish on-going standards and guidelines for the project management processes and utilization of Microsoft Project Professional and the Project Online system within the Division of Technology and Advanced Solutions (DTAS). This document will be updated on a regular basis to detail decisions for portfolio and project management use within the system.

### PMO Service Management

# PMO Service Management



### Definitions

**PPM (project and portfolio management)** is a methodology used to prioritize projects based on cost, benefits and use of resources to achieve business goals. (<http://searchcio.techtarget.com/definition/PPM-project-and-portfolio-management>)

**IT Portfolio Management** is a risk based approach to the selection and management of organizational projects integrating business and DTAS planning, budgeting, standards, processes and governance. (<http://www.gsa.gov/portal/content/103378>)

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**Project management (PM)** Project management is the discipline of using established principles, processes and policies to manage a project from conception through completion and requires the application of knowledge, skills, tools, and techniques to project activities to meet the project requirements.

**Projects.** The standard definition of a project is that it is work that is taken on as a temporary endeavor, with a defined start and end date and produces a unique product, service or result and therefore has a defined scope and need for resources. A project is unique in that it is not a routine operation, but a specific set of activities designed to accomplish a singular goal.

**Operational Work.** Operational work is ongoing, repetitive and typically follows defined processes, procedures and/or checklists. Some operational work is framed around supporting business users in *their* day to day operational work. DTAS operational work is done to achieve DTAS goals and support/sustain the day to day operations of UT. DTAS operational work is often labeled as a: Service Request, Incident (iSupport) Ticket, Maintenance, Enhancement or Upgrade, and/or Application Support Request. Some operational work may need to be managed in the Project Online system if it meets the complexity criteria established by the DTAS Project Review Board.

**DTAS Project Review Board.** The DTAS Project Review Board is responsible for measuring complexity and applying expert judgement to project proposals for the purpose of determining the appropriate project management processes. Membership of the DTAS Project Review Board is drawn from DTAS Leadership and the PMO Office.

**DTAS Customer.** For the purpose of this document, a DTAS Customer is defined as a functional area of the University of Toledo, outside of DTAS, or an external organization from which project requests may be initiated.

**Project Online.** Also, known as the project web app. Project Online is a flexible online solution for project portfolio management (PPM) and everyday work. Delivered through Office 365, Project Online provides powerful project management capabilities for planning, prioritizing, and managing projects and project portfolio investments — from almost anywhere on almost any device. We have 3 instances of Project Online:

- **PWA:** This instance of Project Online is the production instance used to capture the portfolio of DTAS project work and is accessed at: <https://rocketsutoledo.sharepoint.com/sites/pwa>
- **TestPWA** This instance of Project Online is available as a sandbox for DTAS users. This instance is accessed at: <https://rocketsutoledo.sharepoint.com/sites/testpwa>
- **TrainPWA** This instance of Project Online is used for training events and is accessed at: <https://rocketsutoledo.sharepoint.com/sites/trainpwa>

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**Project Professional 2016.** Microsoft Project Professional 2016 is a desktop application that provides project management tools to manage projects. The program allows users to: create a project work breakdown structure (WBS), which breaks down the project scope into work packages, and a project schedule, understand and control project schedules and finances, communicate and present information and the project status, and organize work and people to make sure that projects are completed on schedule. Project Professional is fuller featured and provides much greater control over the project schedule than Project Online. Project Professional can be configured to connect to our Project Online instances to create, edit, and publish projects. Project Professional is the recommended platform for creating and editing projects.

**Effort project planning** is based on determining the number of work units (i.e. hours, days, etc.) required to complete a set of tasks as opposed to duration or date driven where project dates are set based on time periods. For effort based planning, due dates are dynamic and determined by resource availability and actual work completed.

### Standards

**DTAS Projects.** For the purpose of properly identifying and understanding the work performed by DTAS resources, the PMO extends the standard definition of a project to include these parameters: a project entered into our Project Online portfolio require a level of complexity to merit the rigor and oversight of a managed project. Measures of complexity include: project type, estimated project duration and work (in man hours), size of the project team, impact of the project work, estimated project cost, level of assessed risk, and need for progress visibility. Determination of which projects are to be managed in the Project Online portfolio will be made utilizing the DTAS Project Review Board.

**Project Intake.** Projects ideas and requests initiated by DTAS Customers are submitted into the project intake process (workflow). After the project request has been received and accepted by the appropriate DTAS Director, an analyst is assigned to work with the requestor to develop the business case and a high level scope statement. Upon completion of the initial analysis, the project proposal is submitted to the appropriate review board. Strategic and regulatory projects are submitted for Governance review, acceptance and prioritization. Non-strategic projects, accepted by the managing DTAS Director are submitted to the DTAS Project Review Board to determine the appropriate project management methodology.

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Non-strategic projects initiated by DTAS leadership and seeking to be included in the Project Online portfolio, are assigned to a business analyst or designated resource to develop a high level scope statement that will be submitted to the DTAS Project Review Board for review and to determine the appropriate project management methodology.

**DTAS Project Management Methodology.** All DTAS areas are required to *manage* all projects within our Project Online system adhering to a prescribed set of project management processes established by the PMO office. Methodologies are prescribed based upon the project complexity. Projects managers will produce specified project artifacts that support the planning, execution, monitoring, controlling and closing of the project work, as appropriate for the project.

**Project Lifecycle.** The Lifecycle of a PMO Project follows this progressing, via the Project Status Column: **Initiation, Approved, Planning, Active, Completed**. Projects denied or pulled from execution are given a Status designation of **Rejected, Withdrawn, and On-Hold**. For **Rejected, Withdrawn, and On-Hold projects**, resources must be released from the project by setting all "not started" tasks to "Inactive" and/or setting remaining work to 0 for tasks that have "started" and have work reported against them. This process for releasing project resources from assignments will remove all obligations on the resource to work on project tasks.

**PMO Project Review.** The PMO is tasked with the review and oversight of the projects entered into the Project Online system. In scope: the project management process and the use of "best practices" for planning, scheduling, monitoring, and controlling the project scope, cost and schedule; maintaining clean data in the project system. Out of scope: the who, what and when – as it relates to the actual project work.

As part of the PMO Project Review, projects progressing from a project status of **Planning to Active** will be subject to a gated review by the PMO to ensure that the project schedule and project artifacts adhere to defined standards.

**Project Baseline.** A baseline represents the original and approved project plan and it represents the standard that is used to measure the performance of the project.

**Project Slippage.** Project slippage is the time a project is late compared to the initial schedule baseline. It can also be defined as the variation between the planned dates of the project start and finish.

**Project Status Dates.** Project status dates provide a means to identify project progress and measure project performance at a particular point in time against the project baseline. All projects within the Project Online portfolio will use the *Status Date* feature to allow meaningful project reporting of performance and to identify project slippage.



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**Project Update Cycle.** A project should be rigorously managed for schedule, scope and cost performance. Thus, projects are updated on a planned (and pre-defined schedule) with the Status Date and any remaining work (due to schedule slippage) is rescheduled. Delayed work that lingers in the past is out of view when considering resource demand and capacity for future assignments – and can create over allocated resource demand.

**Reporting Work via Project Online Timesheets.** All DTAS employees are required to log their time in the Project Online through the timesheet reporting process. Reported time should equal the actual work performed and any paid or unpaid time off. Work performed is allocated across the various project tasks and operational, support and service work performed that week. All timesheet entries are to be made by Monday, 12 pm noon for the proceeding week (or on the next scheduled workday if Monday is a holiday.)

**Timesheet Administrative Categories.** Work performed by DTAS employees that does not relate to a project assignment may be entered into a defined Administrative (Support/Services) Time Category to enhance our ability to understand DTAS resource allocations. Requests for additional timesheet administrative categories should be submitted to the PMO.

**Reporting Planned Time Off.** Planned time off should be entered into the resource's Time Sheet at the earliest opportunity to allow project managers to adjust project schedules, as needed.

### Project Guidelines

**Project Entry.** The point at which projects are entered into Project Online varies based upon the project path through Project Intake. Projects identified as Strategic or Regulatory are entered into Project Online in advance of the Governance Review Meeting. Those projects are assigned a Project Status of “**Initiation**”, unless approval for the project has been made prior to entry. In those cases, Project Status should be valued at “**Planning**”. All other projects may only be entered after approval by the DTAS Project Review Board.

**Business Drivers.** Business Drivers are defined by the UT President and implemented by the PMO. Business Drivers enable us to use Project Online to evaluate and prioritize projects based upon a system derived value. Business Drivers must be assessed by a business analyst and entered into the Project (via the Project Online - Strategic Impact menu option) prior to the presentation of the project to Governance.

**Project Importance and Priorities.** Project Importance is a custom field with ordinal values that identify importance as Low, Medium and High and is used to generalize the urgency of the project work. Strategic work from UT Administration, Academics and Clinical customers is reviewed and

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ranked by our Governance Committee members to determine priorities – as they align to the Portfolio Business Drivers. The derived prioritization of the projects from the Governance Committee's deliberations are entered into a custom field, Project Priority. Project Priorities are there to direct resource efforts when conflicts arise between projects with constrained resources.

**Enterprise Project Types.** Project online uses a field called Enterprise Project Type (EPT) to support the use of project templates, workflows, and default project sites. EPTs will be implemented as opportunities are identified for such use. Currently, EPTs are defined as Strategic, Regulatory, Operational and External but there are no unique artifacts associated with those types and they are used as project metadata. Requests for establishing EPTs may be made with the PMO staff.

**Project Categories.** Project Online allows the use of custom fields. Project category is a custom field for reporting purposes. Project Categories are useful for classifying, measuring and reporting purposes. Current categories include: **Strategic, Regulatory, Operational** (which is a catch-all for non-strategic and non-regulatory projects for DTAS Customers), **External, and DTAS** (which represents projects initiated by DTAS). Project categories are identified at project entry.

**General Resource Availability.** Resource availability is defined, in Project Online, by the resource manager. A resource with a defined availability of 80% is expected to be available, on average, 32 hours per week for project work. The resource availability can be changed by the resource's manager or by sending a request to the PMO team. DTAS Managers are expected to review their resources' availability and make adjustments needed to reflect a minimum availability for project work.

**Project Resource Availability.** Projects will utilize a formal Resource Engagement request system whereby resource availability is negotiated for the project – both the hours of estimated work required by the project and the resource's availability to complete the work within a specific timeline (expected duration). Ideally, projects will be granted a resource's full '**project**' availability – rather than dividing the resource's project time across multiple project initiatives. Thus, a resource with a defined availability of 40% is expected to be available, on average, 16 hours per week for the assigned project work.

**Project Work Breakdown Structure.** In the project planning phase, a work breakdown structure (WBS) should be developed by the project manager with assistance from the project team and other project stakeholders. The work breakdown structure should be organized by Project Phases or Deliverables. The lowest level of the WBS should identify the work to be performed – also known as a task. According to best practices, a task should represent between 4 and 80 hours of work and be assigned to a single resource or team. Projects are not intended to be checklist.

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**Project Scheduling.** Project Professional should be configured to make new tasks, by default, auto scheduled, effort driven and fixed work. These settings will allow Microsoft Project to derive due dates based on estimated work, the number of resources and resource availability. Other guidelines for scheduling projects include:

- Accurately set-up tasks dependencies. Only one task in the schedule should have no predecessors. All other tasks should identify a predecessor.
- Use Manually Scheduled (fixed start dates) only when appropriate (i.e. training on a specific date, or waiting for the delivery of a part). Even then, task constraints are preferable and should be used, when possible.
- Set Task Type to **Fixed Duration for meetings, but NOT effort driven.**
- To Schedule Project work: Set Task Type to Fixed Work, estimate and enter the work in hours and identify and enter the expected task duration in days
- Tasks entered as Fixed Units, should, under most circumstances, flag the task as **Effort driven.**

**Project Meetings.** Project meetings should be held to a minimum. Status meetings should be infrequent (and short) in a well-run project. Best practices recommended by the PMO suggest that meetings be tied to a project activity such as Planning, Design, Testing, etc. Meeting time scheduled over the life of the project should be avoided, where possible.

**Recurring Meetings - Tasks.** Those projects that require repetitive tasks, such as attending team meetings, should schedule those meetings as a recurring task. As the name suggests, a recurring task is repeated at specified frequency such as daily, weekly, monthly, or yearly. Recurring Meetings should be created as Fixed Duration, NOT Effort Driven. The total hours of work associated with each meeting would be the product of the number of resources assigned to attend the meeting times the length of the meeting (in hours).

**Completed Projects.** The Project Status field is just a reporting attribute and a status of “Completed” does not close a project. To close correctly, the % Complete for all Tasks must be 100%. To do this, for each task, enter Actual Work hours to match or exceed the estimated Work hours for the task in the Project (this should have been done automatically via time entered by the Resource on their weekly), or enter zero for Remaining Work. This will calculate the % Complete to 100% and essentially close the Task. Do not directly edit the % Complete field as this will assign the remaining work in the current Timesheet to the assigned Resources.

**Rejected, Withdrawn or On-Hold Projects.** It is important to inactivate tasks for non-active projects with Remaining Work > 0. This includes projects with the Project Status field for Rejected, Withdrawn or On-Hold. This will prevent inflated resource demand from being reflected in the portfolio. To do this, open the project using Microsoft Project Professional 2016 client, go to each task with remaining work > 0 and select Inactive from the top menu (on the Task Ribbon). You cannot inactivate tasks that already have actual hours, but you can close these

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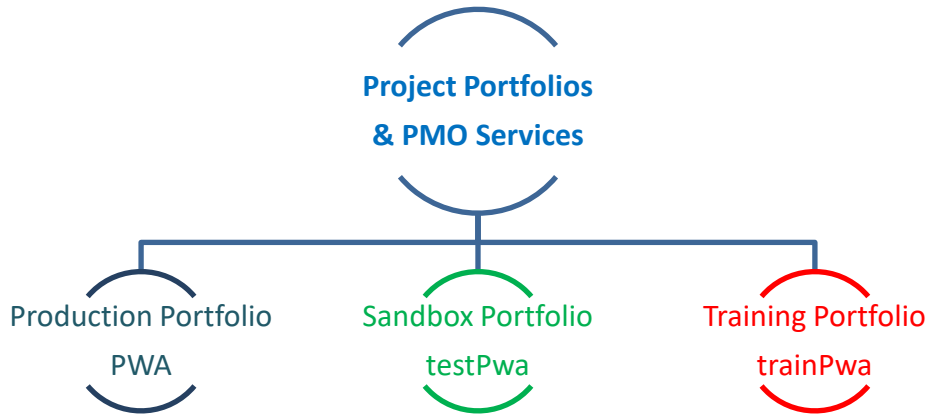
task by entering zero for Remaining Work. If the potential exists for the project to be re-activated, making notes about remaining work in the Tasks Notes field will aid a quicker restart.

**Archival of Projects.** Projects are associated with a fiscal year based upon the Actual Finish date of the project. The fiscal year closes on June 30<sup>th</sup>. Within one month of fiscal year end, projects from the previous fiscal year with a **Completed**, **Rejected**, or **Withdrawn** Project Status will be archived. Similarly, projects identified as **On-Hold** will be archived one year after the project's planned finish date. Archived projects are not deleted, but moved into a different permission group and can be restored, if needed. Requests to restore archived project should be directed to the PMO team.

**Deletion of Projects.** While Project Online publishes its limit at 30,000 projects, it also recommends that the number of sites not exceed 2000 in any one instance. As such, the PMO, in partnership with the Collaboration team, will determine when the deletion of archived projects is necessary. Projects scheduled for deletion will be communicated to DTAS Leadership and Managers prior to deletion.

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### PMO Services by Portfolio

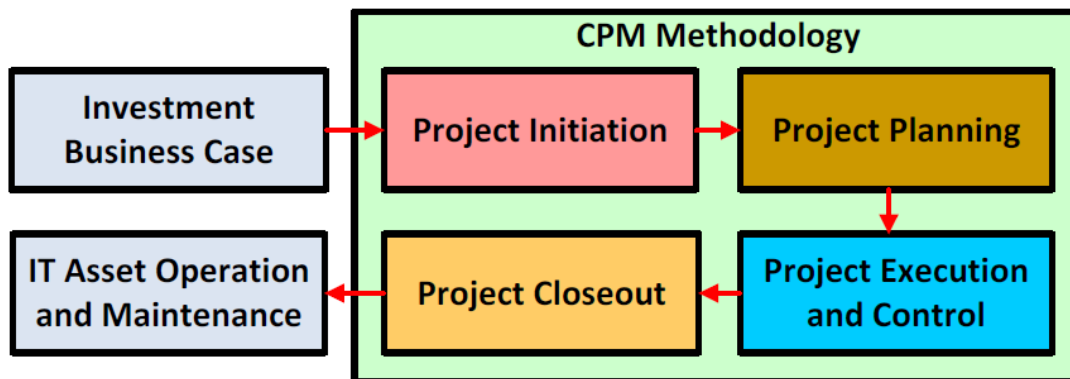


PMO Portfolio	Sandbox Portfolio	Training Portfolio
<b>Project Categories</b> <ul style="list-style-type: none"> <li>▪ Strategic</li> <li>▪ Regulatory</li> <li>▪ Others, via Project Board Approval/Recommendation</li> </ul>	<b>Project Categories</b> <ul style="list-style-type: none"> <li>▪ N/A</li> </ul>	<b>Project Categories</b> <ul style="list-style-type: none"> <li>▪ N/A</li> </ul>
<b>Project Artifacts</b> <ul style="list-style-type: none"> <li>▪ Project Charter</li> <li>▪ Communication Plan</li> <li>▪ Stakeholder Register</li> <li>▪ Risk Register</li> <li>▪ Deliverables Register</li> <li>▪ Change Register</li> <li>▪ Status Report</li> </ul>	<b>Project Artifacts</b> <ul style="list-style-type: none"> <li>▪ N/A</li> </ul>	<b>Project Artifacts</b> <ul style="list-style-type: none"> <li>▪ N/A</li> </ul>
<b>PMO Services</b> <ul style="list-style-type: none"> <li>▪ Project Intake &amp; Approval</li> <li>▪ Portfolio Prioritization</li> <li>▪ Project Methodology &amp; Process Standards</li> <li>▪ Resource Planning &amp; Project Staging</li> <li>▪ Project Baselines</li> <li>▪ Project Audits</li> <li>▪ Project / Portfolio Reporting</li> <li>▪ Project Archival</li> <li>▪ Mentoring, Training &amp; PM Support</li> <li>▪ Project Online Administration</li> </ul>	<b>PMO Services</b> <ul style="list-style-type: none"> <li>▪ Mentoring, Training &amp; PM Support</li> <li>▪ Project Archival</li> <li>▪ Project Online Admin</li> </ul>	<b>PMO Services</b> <ul style="list-style-type: none"> <li>▪ Mentoring, Training &amp; PM Support</li> <li>▪ Project Archival</li> <li>▪ Project Online Admin</li> </ul>

## Project Standards and Guidelines

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### Project Management Methodology/Life Cycle Overview



The project phases make up a project life cycle, and as such, the phases are tailored to fit a project's needs. According to the PMBOK, the elements of a project life cycle should define:

- What work must be accomplished
- What deliverables must be generated and reviewed
- Who must be involved
- How to control and approve each phase

Determining these elements will take a project from start to finish. It provides a systematic, timely, and controlled process that benefits a project's stakeholders. This helps PMs define what needs to be accomplished before moving onto the next phase of a project.

## Project Standards and Guidelines

### 5 Phases of Project Management



According to PMI, “project management is the application of knowledge, skills, tools, and techniques to a broad range of activities in order to meet the requirements of a particular project.” There are five phases of project management and if the lifecycle provides a high-level view of the project, the phases are the roadmap to accomplishing it.

**Initiation Processes** - This is the start of the project, and the goal of this phase is to define the project at a broad level. This phase usually begins with a business case. This is when you will research whether the project is feasible and if it should be undertaken. If feasibility testing needs to be done, this is the stage of the project in which that will be completed.

Important stakeholders will do their due diligence to help decide if the project is a “go.” If it is given the green light, you will need to create a project charter or a project initiation document (PID) that outlines the purpose and requirements of the project. It should include business needs, stakeholders, and the business case.

**Planning Processes** - This phase is key to successful project management and focuses on developing a roadmap that everyone will follow. This phase typically begins with setting goals that are CLEAR.

During this phase, the scope of the project is defined and a project management plan is developed. It involves identifying the cost justification, quality, available resources, and a realistic timetable. The project plans also includes establishing baselines and/or performance measures. These are generated using the scope, schedule and cost of a project. A baseline is

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essential to determine if a project is on track.

At this time, roles and responsibilities are clearly defined, so everyone involved knows what they are accountable for. Here are some of the documents a PM will create during this phase to ensure the project will stay on track:

- **Scope Statement** – A document that clearly defines the business need, benefits of the project, objectives, deliverables, and key milestones. A scope statement may change during the project, but it shouldn't be done without the approval of the project manager and the sponsor.
- **Work Breakdown Structure (WBS)** – This is a visual representation that breaks down the scope of the project into manageable sections for the team.
- **Work Breakdown Structure Dictionary (WBS Dictionary)** – This document extends the WBS provides a detailed information about each element in the WBS.
- **Milestones** – Identify high-level goals that need to be met throughout the project and include them in the Gantt chart.
- **Gantt Chart** – A visual timeline that you can use to plan out tasks and visualize your project timeline.
- **Communication Plan** – This is of particular importance if your project involves outside stakeholders. Develop the proper messaging around the project and create a schedule of when to communicate with team members based on deliverables and milestones.
- **Risk Management Plan** – Identify all foreseeable risks. Common risks include unrealistic time and cost estimates, customer review cycle, budget cuts, changing requirements, and lack of committed resources

**Executing Processes** - This is the phase where deliverables are developed and completed. This often feels like the meat of the project since a lot is happening during this time, like status reports and meetings, development updates, and performance reports. A “kick-off” meeting usually marks the start of the Project Execution phase where the teams involved are informed of their responsibilities.

Tasks completed during the Execution Phase include:

- Develop team
- Assign resources
- Execute project management plans
- Procurement management if needed
- PM directs and manages project execution
- Set up tracking systems
- Task assignments are executed
- Status meetings



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- Update project schedule
- Modify project plans as needed

While the project monitoring phase has a different set of requirements, these two phases often occur simultaneously.

**Monitoring/Controlling Processes** - This is all about measuring project progression and performance and ensuring that everything happening aligns with the project management plan.

- **Project Objectives:** Measuring if a project is on schedule and budget is an indication if the project will meet stakeholder objectives.
- **Quality Deliverables:** This determines if specific task deliverables are being met.
- **Effort and Cost Tracking:** PMs will account for the effort and cost of resources to see if the budget is on track. This type of tracking informs if a project will meet its completion date based on current performance.
- **Project Performance:** This monitors changes in the project. It takes into consideration the amount and types of issues that arise and how quickly they are addressed. These can occur from unforeseen hurdles and scope changes.

During this time, PMs may need to adjust schedules and resources to ensure the project is on track

**Closing Processes** - This phase represents the completed project. Contractors hired to work specifically on the project are terminated at this time. Valuable team members are recognized. Once a project is complete, a PM will often hold a meeting – sometimes referred to as a “post mortem” – to evaluate what went well in a project and identify project failures. This is especially helpful to understand lessons learned so that improvements can be made for future projects.

Once the project is complete, PMs still have a few tasks to complete. They will need to create a project checklist of things that didn't get accomplished during the project and work with team members to complete them. Perform a final project budget and prepare a final project report. Finally, they will need to collect all project documents and deliverables and store them in a single place.

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### PMO Service Map Processes

PMO-as-a-Service executes the enterprise's strategy by composing a tailored roadmap, assigning the right tools and developing the ideal performance indicators, goals, balanced scorecard, metric, reporting, planning and resources.

#### Strategic Alignment:

**Interpret & Test Business Drivers** – Ensure the Business drives in the Project System aligns with The University of Toledo's Strategic Priorities set forth by the President. We will use UT President's Goals to interpret and map to MS Project Business Drivers / Apply in Project Online and Test for valid outcomes.

**Run Portfolio Analysis** - The PMO facilitates with the annual solicitation and review of DTAS initiatives, regularly schedule portfolio reviews and analyze current Project Portfolio for progress and costs.

**Plan/Publish Governance Agendas** – Assist with developing the metrics and the plans that are presented to the different governance committees of new project requests.

**Lead Portfolio at Governance Meetings** – Provide guidance and assistance to the Governance chair during meetings with determining approvals and portfolio prioritization.

**Update & Publish Prioritized Portfolio** – Provide support and publish the metric used to show Project Priorities from the outcomes of the governance meetings and publish re-prioritized portfolio

#### Operational/Planning:

**Establish Project Intake & Approval Processes** – The Intake and selection process for new project request, during this process the projects are assigned to a responsible party who will collect the project requirements prior to being presented to the governance committee. Work with DTAS stakeholders to develop, implement and monitor processes for project intake and approval.

**Analyze Resources Demand** - Analyze and Report on Resource Demand for approved and staged projects

**Perform Capacity Planning** - Analyze and Report on Resource Capacity versus demand.

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**Coordinate Cross Functional Resources Requests** - Coordinate resource requests for projects requiring assignment of work across functional lines

**Plan Project Staging** - Determine anticipated start / completion dates for projects, based upon high level estimates of required resources against project portfolio and resource capacity.

**Provide Project Online Admin** - Configure Project Online, add users, set permissions, add views, lists and custom fields, support users, and handle "tickets."

**Close & Archive Projects** - Set and execute project closure and archival processes.

### Support & Mentoring:

**Train PM's in Project Management Practices** - These services are provided through a variety of avenues; consulting is provided via direct support in developing project proposals, project charters, business requirements, work breakdown structures, budget estimates, etc.; Identify and Plan for training needed to improve project management knowledge and skills.

**Provide Training in MS Project** - PMO staff will offer training for managing projects and portfolios in the Project and Portfolio Management software application. The PMO departmental website provides education on project and portfolio management, governance, project classification, the project management life cycle, process improvement, the process to submit a proposal for approval, etc., one-on-one training and the website has an array of training videos available. Identify and Plan for training needed to improve utilization of MS Project Online and MS Project Professional by all levels of users.

**Coach & Mentor PM's** - Provide Project Management mentoring; tools to support and best Project Management practices Mentor, train, and guide the organization's project teams as they learn and then adopt PM best practices in their projects. Work with Project Managers to help apply best practices of Project Management and use of Project Online/Professional

**Serve as Librarian for Project Management Process Assets** - Curate Project Management assets - for such items as Project Charters, Communication Plans, Change Management, Project Closure, Lessons Learned, Issues and Risks

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### Project Governance:

**Define DTAS Project Management Standards** - The services supported include administration of Microsoft Project system the official Project and Portfolio Management application, a resource library will be maintained with a variety of templates, worksheets, forms, examples, presentations, and tools based on best practices. Coordinate efforts to define project management standards: use of baselines, project charters/statements of work, WBS, resource engagements, communication plans, handling change requests, etc.

**Develop Reporting Standards** - Define, design and develop project reports for oversight, metrics and exception reporting of project activities and results.

**Publish Project Metrics & Reports** - Provide a variety of regular updates ranging from monthly status of enterprise projects to an annual report on the organization's progress at institutionalizing Project Management.

**Conduct Audits for Compliance to PM Standards** - Audit Projects to identify training needs and improve project plans and accuracy of schedules, resource utilization and conformance to project management standards.

## Project Standards and Guidelines

### PMO Services RACI Matrix

PMO Services RACI Matrix											
	PMO Director	PMO Staff (GA's)	PMO Staff (Advisor) *	Collaboration Systems Architect	CIO	Portfolio Managers [IT Leadership]	Governance Committee Member	Resource Managers [IT Managers]	Project Managers	Project Team Members	Business Analysts
R - Responsible Who is doing the work?											
A - Accountable Who is ultimately accountable?											
C - Consulted Who should/can provide feedback or technical advice?											
I - Informed Who should be kept in the loop?											
Lead Portfolio Discussion at Governance Meetings	C					R/A	C				
Update & Publish Prioritized Portfolio	R/A	I	I		I	I	I	I	I	I	I
<b>Support &amp; Mentoring</b>											
Train PM's in Project Management Practices	A	I	R			C		C	I		
Provide Training in MS Project	A	I	R			C		C	I	I	
Coach and Mentor PM's	A	I	R			I		I	I		
Serve as Librarian for Project Management Process Assets	A	I	R			I		I	I		I
<b>Project Governance</b>											
Define DTAS Project Management Standards	R/A	C	C			C		C	C/I		I
Develop Reporting Standards	R/A	I	I			C					I
Publish Project Metrics & Reports	A	R	C/I			C/I	I	C/I	I		I
Conduct Audits for Compliance to PM Standards	A	I	R			I		I	I		I
<b>Operational &amp; Planning</b>											
Establish Project Intake & Approval Processes	A	C	C	R	C	C			C		C
Analyze Resource Demand	A	C	R		I	I		I			I
Perform Capacity Planning	A	C	R		I	I		I			I
Coordinate Cross-Functional Resource Requests	A	C	R			C/I		C/I	I		
Plan Project Staging	A	C	R			C/I	I	C/I	C/I		
Provide Project Online Administration	A	R	C	C		C/I		I	C/I	I	
Close & Archive Projects	A	R	C	C		C/I	C/I	I	C/I	I	

*\*Role of PMO Advisor goes away and responsibilities transfer to GA's*