PMINJ Chapter
Symposium - 07 May 2018

Aligning Your Project Portfolios Strategically

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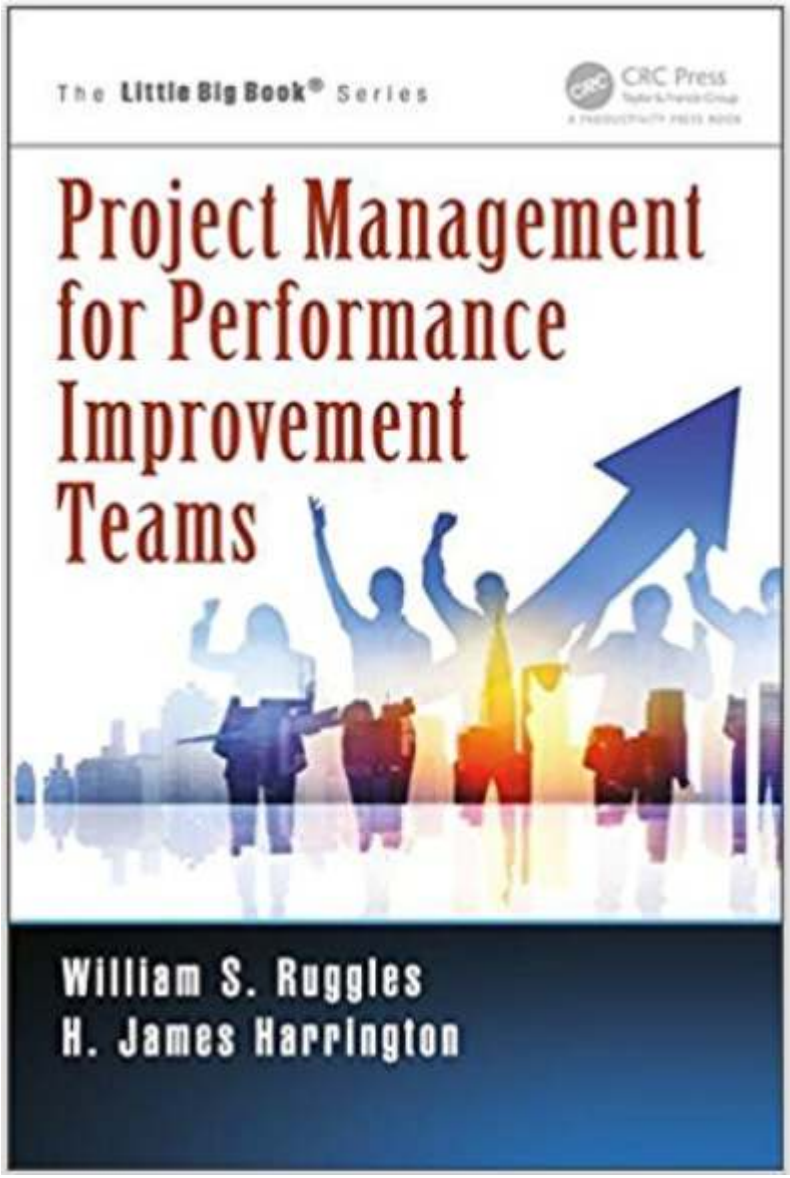
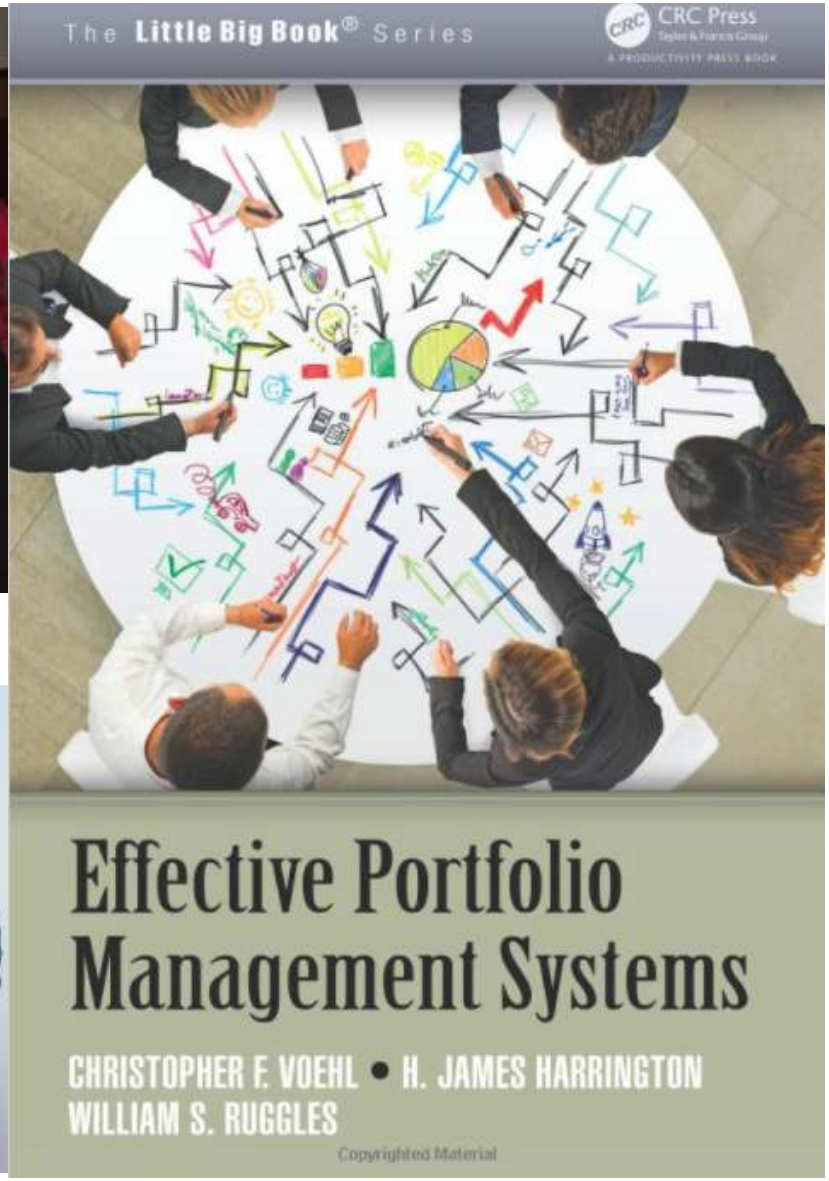
About Your Presenter





Aligning Your Project Portfolios Strategically

This Presentation will cover the following topics:

- The thirteen (13) factors that should lead to the creation of a project or program.
- The seven (7) steps – their Inputs, Activities, and Outputs -- for establishing a PMO and creating a strategically-aligned (e.g., “effective “) Project Portfolio.
- Project Portfolio Strategic Alignment Case Study Overviews:
  - Life Sciences
  - Public Health
  - State Government
- Q & A’s

13 Factors That Lead to the Creation of a Project

Each project in the portfolio should be initiated as the result of a Business Case describing one of the following thirteen (13) prioritized reasons it should be undertaken:

1. New Technology
2. Competitive Force(s)
3. Material Issue(s)
4. Political Change(s)
5. Market Demand
6. Economic Change(s)
7. Customer Request
8. Stakeholder Demand(s)
9. Legal Requirement
10. Business Process Improvement
11. Strategic Opportunity or Business Need
12. Social Need
13. Environmental Consideration(s)

PMBOK® Guide, 6th Edition, p. 9, © 2017 - Project Management Institute

7 Steps for Creating a Strategically-Aligned Project Portfolio

1. Assign Someone to Set Up the PMO and Create the Project Portfolio.
2. Classify the Business Cases Using a Qualitative, Quantitative or Blended Model.
3. Prioritize the Projects and Programs in the Portfolio Based on the Resources Available.
4. Select the Projects and Programs for Each Portfolio and Assign a Portfolio Leader to Oversee Each One.
5. Identify the Sponsor and Manager for Each Project/Program.
6. Define the Milestones and a High-Level Budget for Each Project/Program.
7. Obtain Executive Approval for Each Project/Program and Its High-Level Schedule and Budget.

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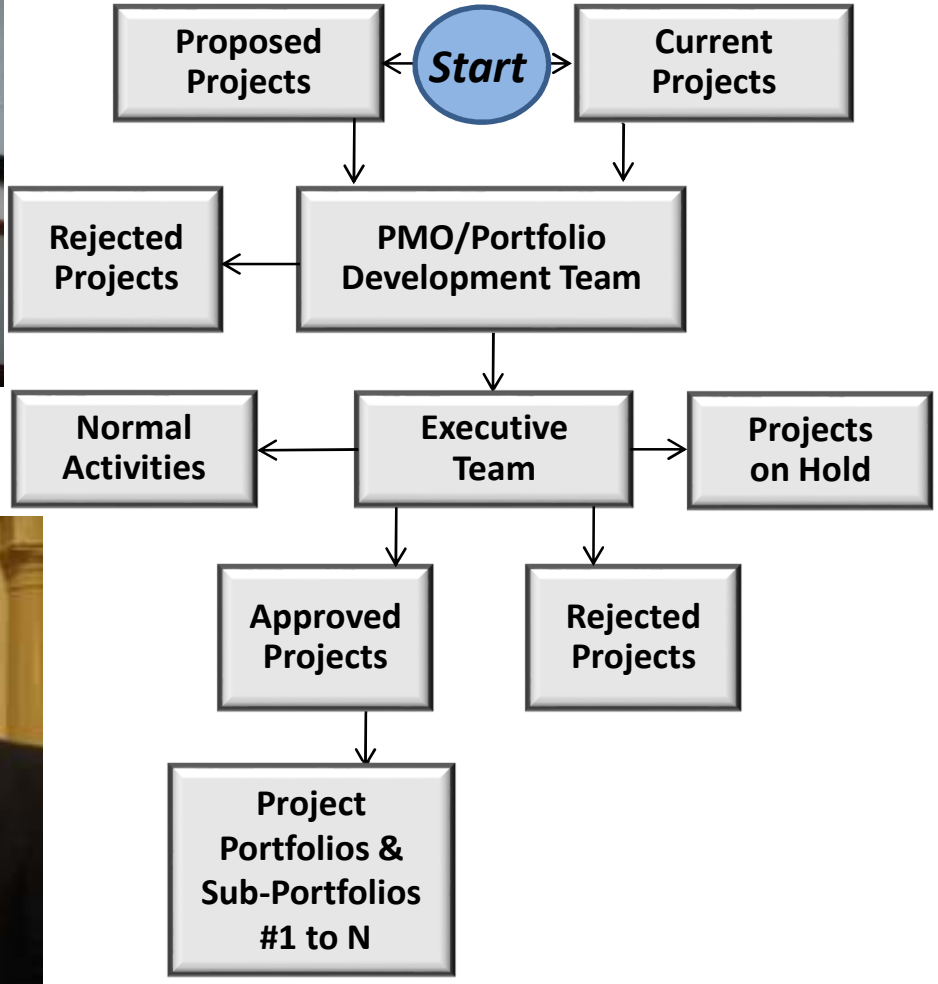
Setting Up the PMO and Creating the Portfolio



PMO Set-Up and Portfolio Creation Process

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Step #1: Assign Someone to Set Up the PMO and Create the Portfolio*

* - *Effective Portfolio Management Systems*, pp. 21-29, © 2016 – Productivity Press.

Step #1: Inputs – Activities – Outputs

Assign Someone to Set Up the PMO and Create the Portfolio*

INPUTS

1. Org's MVV Statement & Strategic Plan
2. PMO's Mission Statement
3. PMO Director Job Description
4. PMO Director Roles & Responsibilities
5. PMO Staff Job Descriptions
6. PMO Staff Roles & Responsibilities

ACTIVITIES

1. Recruit qualified candidates for PMO Director & Staff.
2. Interview qualified candidates for PMO Director.
3. Select and on-board the PMO Director.
4. New PMO Director Interviews individual PMO Staff.
5. Select and on-board the new PMO Staff Support Team.

OUTPUTS

1. A PMO Director
2. A PMO Staff Support Team
3. A set of criteria aligned with the Org's Mission & Strategic Plan and the PMO's Mission Statement to classify and rank the Business Cases.

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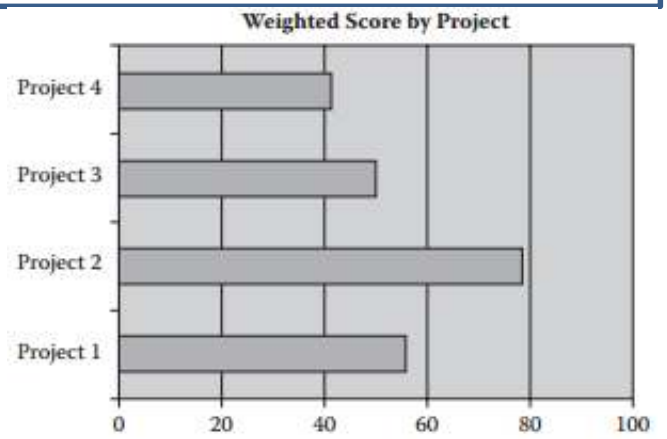
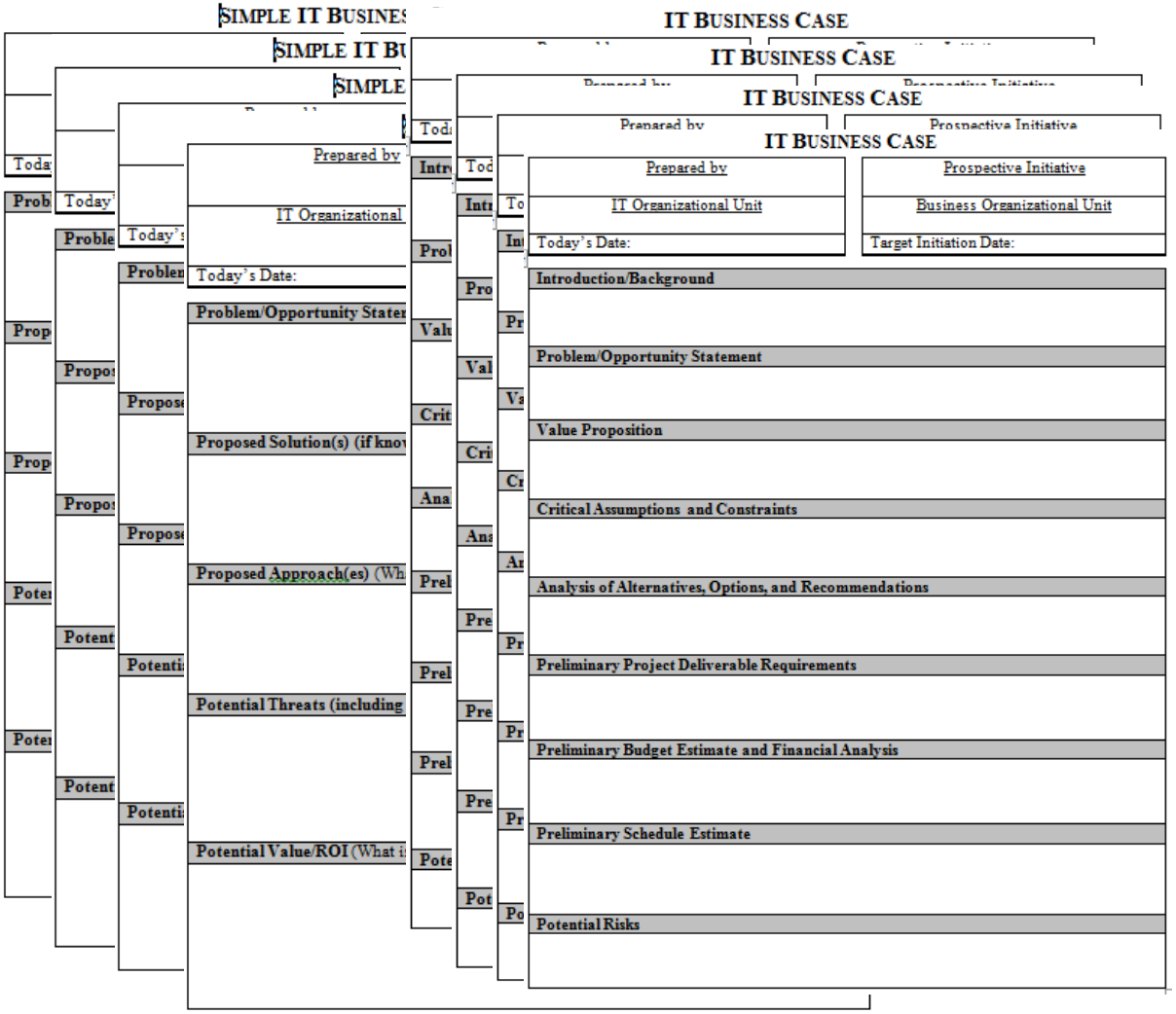
Step #2: Classify the Business Cases Using a Quantitative, Qualitative or Blended Model*

Business Case Compliance with Key Business Considerations

#	Item	Criteria
1	Mission Statement	Must comply
2	Policy	Must comply
3	Vision Statement	Should comply
4	Values	Must comply
5	Strategy	Must comply
6	Critical for Success Factors	Need not comply
7	Business Objectives	Must comply
8	Organizational Goals	Should comply
9	Strategic Business Plan	Must comply





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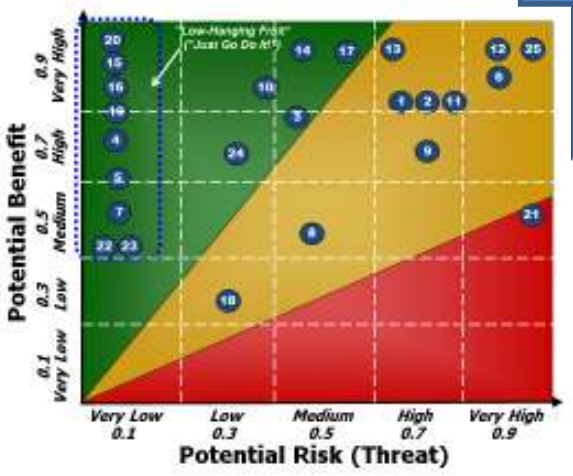
Step #2: Inputs - Activities – Outputs

Classify the Business Cases Using a Quantitative, Qualitative or Blended Model*

INPUTS

1. A PMO Director
2. A PMO Staff Support Team
3. A set of Aligned Classification Criteria
4. The Business Cases



ACTIVITIES

1. Validate or disqualify the Business Cases.
2. Document the performance and project resource requirements for each.
3. Identify those Business Cases that do NOT require add'l resources.
4. Select and apply the Classification Criteria and Rank the Business Cases.
5. Determine and apply the pertinent Model: Quantitative, Qualitative, or Blended.

OUTPUTS

1. A Ranked-Ordered List of Projects and Programs.

Rank-Ordered Organizational Portfolio of Projects & Programs					
Proj/ Prog #	Do-It-Now	Must Do	Need to Do	Nice to Do	Defer
20	Yes				
15	Yes				
16	Yes				
19	Yes				
4	Yes				
5	Yes				
7	Yes				
22	Yes				
23	Yes				
14		Yes			
10		Yes			
17		Yes			
3		Yes			
24		Yes			
13			Yes		
1			Yes		
2			Yes		
11			Yes		
9			Yes		
6			Yes		
12			Yes		
25			Yes		
8				Yes	
18				Yes	
21					Yes

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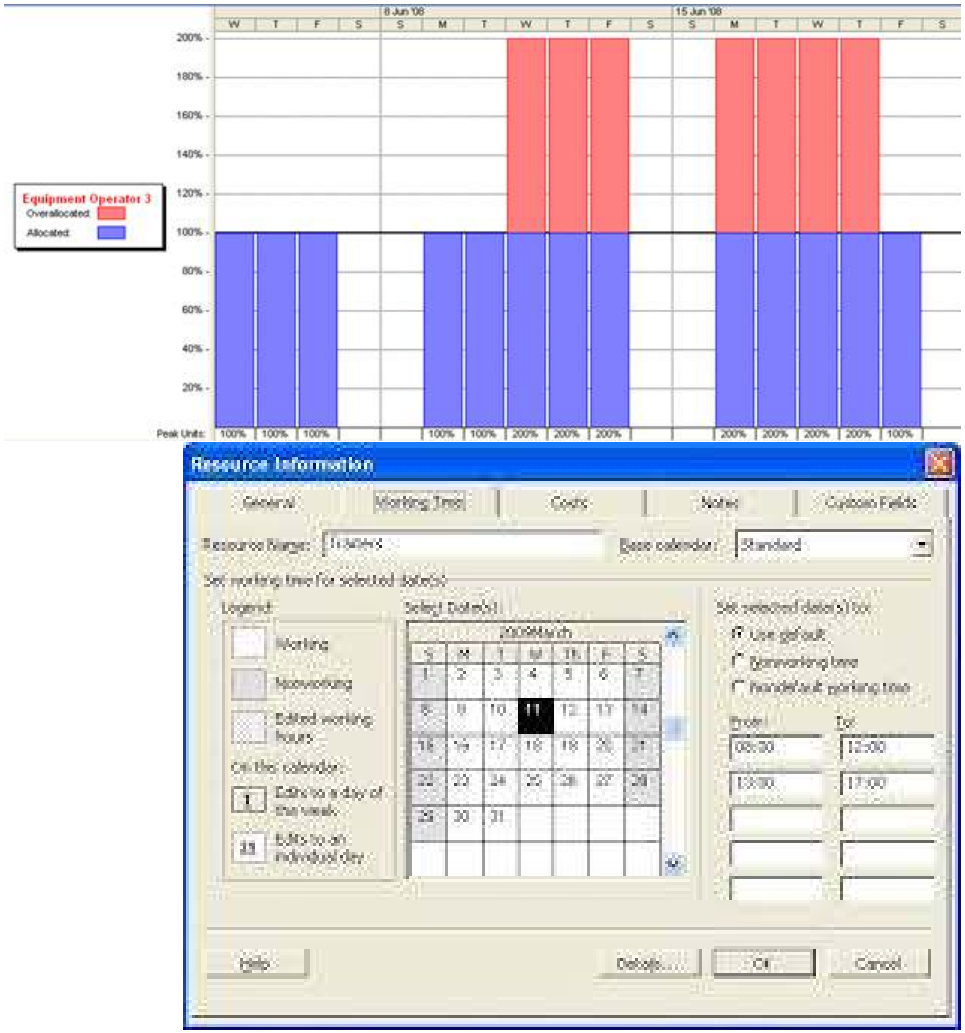
Step #3: Prioritize the Projects and Programs in the Portfolio Based on Resource Availability*

Resource-Leveled, Rank-Ordered Projects & Programs					
Proj/Prog #	Do-It-Now	Must Do	Need to Do	Nice to Do	Defer
20	Yes				
14		Yes			
15	Yes				
17		Yes			
16	Yes				
10		Yes			
19	Yes				
3		Yes			
4	Yes				
24		Yes			
5	Yes				
7	Yes				
22	Yes				
23	Yes				
13			On-Hold		
1			On-Hold		
2			On-Hold		
11			On-Hold		
9			On-Hold		
6			On-Hold		
12			On-Hold		
25			On-Hold		
8				On-Hold	
18				On-Hold	
21					No



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Step #3: Inputs – Activities – Outputs

Prioritize the Projects and Programs in the Portfolio Based on the Resources Available*

INPUTS

1. A Ranked-Ordered List of Projects and Programs.
2. Manpower or Staffing Plans organized by Function, Dept, and Business Unit.
3. Documented Performance and Projected Resource Requirements for Each Project/Program.

ACTIVITIES

1. Determine Financial, Personnel, and Facilities Req'ts.
2. Assign resources to the highest-priority projects/programs.
3. Analyze and compare the value for active projects/programs.
4. Consider other resource allocation and alignment factors.
5. Present to the entire Executive Team.

OUTPUTS

1. A List of "Active" Projects/Programs.
2. A List of "Pending" Projects/Programs.
3. A List of "Dropped" Projects/Programs.
4. A Description of Each "Active" and "Pending" Project/Program.
5. Updated Performance and Projected Resource Requirements for Each Project/Program.

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Step #4: Select Projects and Programs for the Portfolio(s) and Assign a Portfolio Leader to Oversee Them*

Resource-Leveled, Rank-Ordered Projects & Programs					
Proj/Prog #	Do-It-Now	Must Do	Need to Do	Nice to Do	Defer
20	Yes				
14		Yes			
15	Yes				
17		Yes			
16	Yes				
10		Yes			
19	Yes				
3		Yes			
4	Yes				
24		Yes			
5	Yes				
7	Yes				
22	Yes				
23	Yes				

ASSIGNED PORTFOLIO LEADERS, SUB-PORTFOLIOS, PROJECTS AND INITIATING SPONSORS

ID#	Portfolio Leader	Project Sub-Portfolio	Project/ Program #	Project Rank	Initiating Sponsor	Sustaining Sponsor	Project Manager
1	Carlos	A	20	1	Justin		
2			23	14	Sharon		
3			14	2	Yuri		
4			13	15	Barry		
5	Jacquie	B	15	3	Larry		
6			7	12	Betty		
7			17	4	Carole		
8			6	20	Miriam		
9	Frank	C	16	5	Mary		
10			10	6	Barry		
11			1	16	Betty		
12			11	18	Larry		
13	Paula	D	19	7	Kurt		
14			22	13	Dick		
15			12	21	Lew		
16	Tammi	E	4	9	Mark		
17			3	8	Luis		
18			2	17	Oscar		
19			25	22	Bill		
20	Dave	F	5	11	Justin		
21			24	10	Carole		
22			9	19	Sharon		

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Step #4: Inputs – Activities – Outputs

Select Projects and Programs for the Portfolio(s) and Assign a Portfolio Leader to Oversee Them*

INPUTS

1. A List of "Active" Projects/Programs.
2. A List of "Pending" Projects/Programs.
3. A List of Qualified Portfolio Leaders.
4. A List of Qualified Initiating Sponsors for all current and approved projects/programs

ACTIVITIES

1. Select the Sub-Portfolio(s) for the Current Portfolio.
2. Match each Sub-Portfolio with a Qualified Portfolio Leader.

OUTPUTS

1. An Updated list of resource-leveled, rank-ordered proposed projects/programs assigned to a Portfolio Leader.
2. A List of Assigned Initiating Sponsors.
3. A List of Assigned Portfolio Leaders.
4. A List of all Current Active Projects, Programs, and Sub-Portfolios.

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Step #5: Identify a Sustaining Sponsor and Manager for Each Project and Program*

QUALIFIED PROJECT MANAGERS LISTING

ID#	Candidate's Name	Position	Office Location	E-Mai
1	Armando			
2	Bob			
3	Carl			
4	Cliff			
5	Craig			
6	Eileen			

APPROVED & ON-HOLD PROJECTS WITH SPONSORS AND PROJECT MANAGERS

ID#	Project/ Program #	Project Rank	Initiating Sponsor	Sustaining Sponsor	Project Manager
1	20	1	Justin	Jeff	Cliff
2	23	14	Sharon	Susan	Eileen
3	14	2	Yuri	Yael	Armando
4	*13*	*15*	*Barry*	*On-Hold*	*On-Hold*
5	15	3	Larry	Lorraine	Eric
6	7	12	Betty	Barbara	Linda
7	17	4	Carole	Christine	Tom
8	*6*	*20*	*Miriam*	*On-Hold*	*On-Hold*
9	16	5	Mary	Mike	Craig
10	10	6	Barry	Justin	Cliff
11	*1*	*16*	*Betty*	*On-Hold*	*On-Hold*
12	*11*	*18*	*Larry*	*On-Hold*	*On-Hold*
13	19	7	Kurt	Chris	Carl
14	22	13	Dick	Ralph	June
15	*12*	*21*	*Lew*	*On-Hold*	*On-Hold*
16	4	9	Mark	Mario	Nancy
17	3	8	Luis	Lemuel	Ramona
18	*2*	*17*	*Oscar*	*On-Hold*	*On-Hold*
19	*25*	*22*	*Bill*	*On-Hold*	*On-Hold*
20	5	11	Justin	Viviana	Eileen
21	24	10	Carole	Will	June
22	*9*	*19*	*Sharon*	*On-Hold*	*On-Hold*

ASSIGNED PORTFOLIO LEADERS, SUB-PORTFOLIOS, PROJECTS AND INITIATING SPONSORS

ID#	Portfolio Leader	Project Sub-Portfolio	Project/ Program #	Project Rank	Initiating Sponsor	Sustaining Sponsor	Project Manager
1	Carlos	A	20	1	Justin		
2			23	14	Sharon		
3			14	2	Yuri		
4			13	15	Barry		
5	Jacquie	B	15	3	Larry		
6			7	12	Betty		
7			17	4	Carole		
8			6	20	Miriam		
9	Frank	C	16	5	Mary		
10			10	6	Barry		
11			1	16	Betty		
12			11	18	Larry		
13	Paula	D	19	7	Kurt		
14			22	13	Dick		
15			12	21	Lew		
16	Tammi	E	4	9	Mark		
17			3	8	Luis		
18			2	17	Oscar		
19			25	22	Bill		

LIST OF 14 SUSTAINING SPONSORS AND ASSIGNED PROJECTS/PROGRAMS

Sustaining Sponsor	Project/ Program #	Project Rank
Barbara	7	12
Chris	19	7
Christine	17	4
Jeff	20	1
Justin	10	6
Lemuel	3	8
Lorraine	15	3
Mario	4	9
Mike	16	5
Ralph	22	13
Susan	23	14
Viviana	5	11
Will	24	10
Yael	14	2

LIST OF 11 PROJECT MANAGERS AND ASSIGNED PROJECTS/PROGRAMS

Project Manager	Project/ Program #	Project Rank
Armando	14	2
Carl	19	7
Cliff	10	6
	20	1
Craig	16	5
Eileen	5	11
	23	14
Eric	15	3
June	22	13
	24	10
Linda	7	12
Nancy	4	9
Ramona	3	8
Tom	17	4

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Step #5: Inputs – Activities – Outputs

Identify a Sustaining Sponsor and Manager for Each Project and Program*

INPUTS

1. A List of Initiating Sponsors for all Current and Approved Projects/Programs
2. A List of all Qualified Project Managers.
3. A List of All Approved Projects/Programs with its Portfolio Leader.
4. Updated Resource Requirements for each Project/Program.

ACTIVITIES

1. Obtain a Qualified Sustaining Sponsor for Each Project/Program.
2. Review each Project/Program to Identify Which Ones Do Not Need a Project Manager
3. Match each "Needy" Project/Program with a Qualified Project or Program Manager.

OUTPUTS

1. A List of Approved Projects/Programs with its Sustaining Sponsor and Manager.
2. A List of the Sustaining Sponsors and Managers With the Projects and Programs Assigned to Each One.
3. A List of Projects and Programs that do not Require a Sustaining Sponsor and Manager to be assigned to them.

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Step #6: Define Milestones and a High-Level Budget for Each Project and Program

Activity	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q
Contract Award	▲											
IBR			▲									
SRR				▲								
PDR								△◆				
CDR												△◇

Current Date

Symbol	Meaning
△	Planned event completion
▲	Actual event completion
△◆	Actual completion behind schedule
△◇	Forecast completion behind schedule

	Estimated budget												
	A		B		D		F		H	I	J		
			C	E				G					
Period	1	2	3	4	5	6	7	8	9	10	11	12	Total
Internal	20000	0	20000	10000	20000	20000	10000	30000	10000	20000	10000	10000	180000
External	20000	0	20000	10000	20000	20000	10000	30000	10000	20000	10000	10000	180000
Business	7500	22500	7500	7500	22500	7500	30000	22500	15000	7500	15000	22500	187500
Total	47500	22500	47500	27500	62500	47500	50000	82500	35000	47500	35000	42500	547500
	Based upon		Internal	5000	per month								
			External	10000	per month								
			Business	7500	per month								

APPROVED PROJECT/PROGRAM EXECUTIVE SUMMARY

Prepared by	Project/Program Name & #
IT Organizational Unit	Business Organizational Unit
Today's Date:	Target Start Date:

Project/Program Goals

Project/Program Objectives

Project/Program Resource Requirements

Potential Project/Program Issues

Milestone Schedule

High-Level Cost Estimates & Budget

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Step #6: Inputs – Activities – Outputs

Define Milestones and a High-Level Budget for Each Project and Program

INPUTS

1. The Final Business Case for each approved Project or Program.
2. List of Managers, an Initiating Sponsor, and a Sustaining Sponsor with each one's assignment to each Project or Program in the Portfolio.

ACTIVITIES

1. Confirm that a Manager has been assigned to each one.
2. Create a Milestone Schedule for each one.
3. Calculate high-level cost estimates and a high-level budget for each one.
4. Write executive summaries for each one.

OUTPUTS

1. A high-level budget and milestone schedule is set for each one.
2. Key management checkpoints or gates are defined and documented for each one.
3. Final Executive Summaries for each one.

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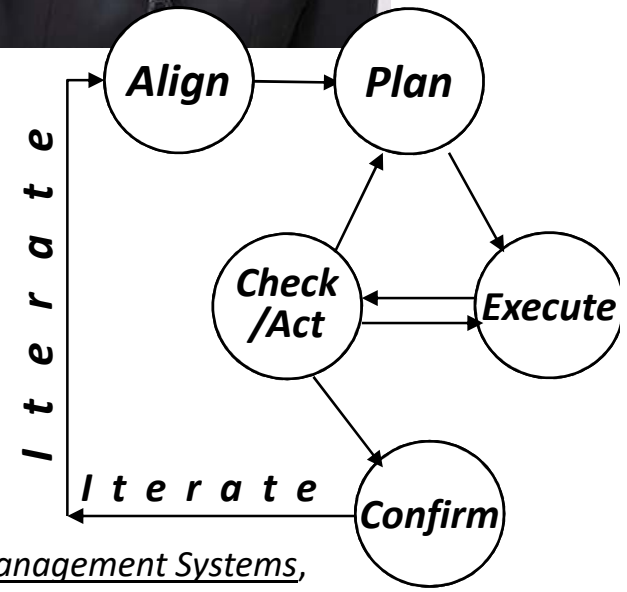
Step #7: Obtain Executive Approval for Each Project and Program in the Portfolio(s)*

Combined 3–Year Improvement Plan

Activity #	Activity	2017 A	M	J	J	A	S	O	N	D	2018 J	F	M	2	3	4	2019 1	2	3	4	Person Responsible
P	3-Year 80-Day Plan 419																				H⊥-EIT
02	Develop ?? Individual Divisions																				EIT
BP	Business Process							Cycle 1							Cycle 3						EIT/Bob C.
10	EPI													Cycle 2					Cycle 4		EIT/Tom A.
ML	Management Support Leadership																				
10	Team Training																				EIT/Task Team
20	DIT																				Dept. Mgrs.
61	MEWA																				Division President
62	Employee Opinion Survey																				H⊥
																					Sam K.
																					Jom B.
																					Task Team
																					H⊥–?? F.
																					H⊥–?? J.
																					Bob ??
																					Jack J.
																					Division President

Portfolio Roadmap

		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Project A	Completed												
Project B	Completed												
Project C	Completed												
Program A	Completed												
Project D													
Project E													
Program B													
Project F													
Project G													
Program C													
Program D													
Program E													
Project H													
Program F													
Project I													
Business Area 1 Operations													
Business Area 2 Operations													
Business Area 3 Operations													
Business Area 4 Operations													
Business Area 5 Operations													



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Step #7: Inputs + Activities

Obtain Executive Approval for Each Project and Program in the Portfolio(s)*

INPUTS

1. Updated Executive Summaries for each one.
2. A List of the Projects and Programs with their Start and End Dates and a Budget for each one.
3. A List of qualified and available Portfolio Leaders and Project/Program Managers.

ACTIVITIES

1. Group all of them into Subportfolios.
2. Prepare a Layout Timeline with interrelationships.
3. Present the Portfolio Layouts to the Executive Committee to obtain approval.
4. Update the documentation related to the team's activities, roles, responsibilities, and authority.

OUTPUTS

Go To Next Slide for the 8 Outputs...

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Step #7: Outputs

Obtain Executive Approval for Each Project and Program in the Portfolio(s)*

O U T P U T S

1. A List of Approved Projects/Programs with their final documentation.
2. A List of Approved Portfolios with their Leaders/Managers.
3. A formal Status Report that summarizes the activities and assumptions for each Project/Program.
4. Minutes of the Executive Committee Review and Decisions Made.
5. Updated Set of Operating Procedures for Project/Program Selection by the Portfolio Leader.
6. Target Start and End Dates and a Budget for each Project/Program.
7. Key checkpoints for each Project/Program, if applicable.
8. Final Executive Summary for each ProjectProgram.

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Project Portfolio Strategic Alignment Case Study #1: The Life Sciences

GSS eProvide II Project

Item	Description
Organization	IT Global Shared Services (GSS) Division of a Fortune 125 Company (Biopharma)
Sponsor	GSS Chief Information Officer (CIO)
Primary Objective	To successfully implement a "Top 10 Project" (eProvide) throughout the company within 12 months.
Proposed Solution	Evaluate, select and deploy throughout the global organization a configurable, COTS system for User Provisioning and Identity & Access Management to replace a customized Lotus Notes system.
Deliverables	Provision of: • The successful deployment of the COTS UP and I&AM System throughout the enterprise. • The completion of this "GSS Top-10 Project" on-time, within-budget and with "Very Favorable" (Level 4 of 5) ratings by the stakeholders in its positive enterprise-wide impact on them.

Project Portfolio Strategic Alignment Case Study #1: The Life Sciences

GSS Top Ten Projects

- Regional Order to Cash (ROtC)
- Product Lifecycle Management
- EMEA Business Intelligence
- TRECnet
- Global JET
- Caribbean SAP
- WorkSmart
- eProvide II
- Keystone (Call Center)
- GPACS

GSS *WorkSmart* Initiative Highlight

Description

The eProvide II project consists of developing and implementing a new, online provisioning solution that will replace eProvide and the R&DI's Account Request Form (ARF), providing us with a single solution for submitting requests for computing accounts, hardware, networking, software, and other services

Benefit

Faster, easier processing of Service Requests via a simplified user interface, streamlined workflow process, automatic account creation, and greater security and compliance via enhanced security features and auditing capabilities

KEY DELIVERABLES:

- R&DI "ARF" Workflow Migration
- "ARF" and eProvide II & Workflow Migration

***WorkRight* Goal Alignment**

Our Cost Base
Our Work

Sponsor

Fname LName, Senior Director - Information Security and Service Assurance

Contact the GSS *WorkSmart* Team at GSS.WorkSmart@abc.com

Project Portfolio Strategic Alignment Case Study #1: The Life Sciences

GSS eProvide II Project Org Chart

Provide governance including a Monthly Performance Report to Sr. Mgmt on the…

Executive Overview Team

Sr. Vice President & CIO
VP & Deputy CIO
Sr. Director – IS&SA
Director – Security
Director – I&AE
Associate Director – PS

…overall status of the project, including Budget and Schedule Variance. (6)

Steering Committee/ Change Control Board

- Act as the final GSS decision-maker on project scope, including scope change requests. (5)

User Acceptance Testers

- Test the new eProvide II system from a User perspective using formal UAT tools and scripts before the 'Go-Live'. (23)

Project Manager
Core Team

- Provide bi-weekly project status and regular cross-functional communications via the GSS Team Leads. (19)

Global Usability Group

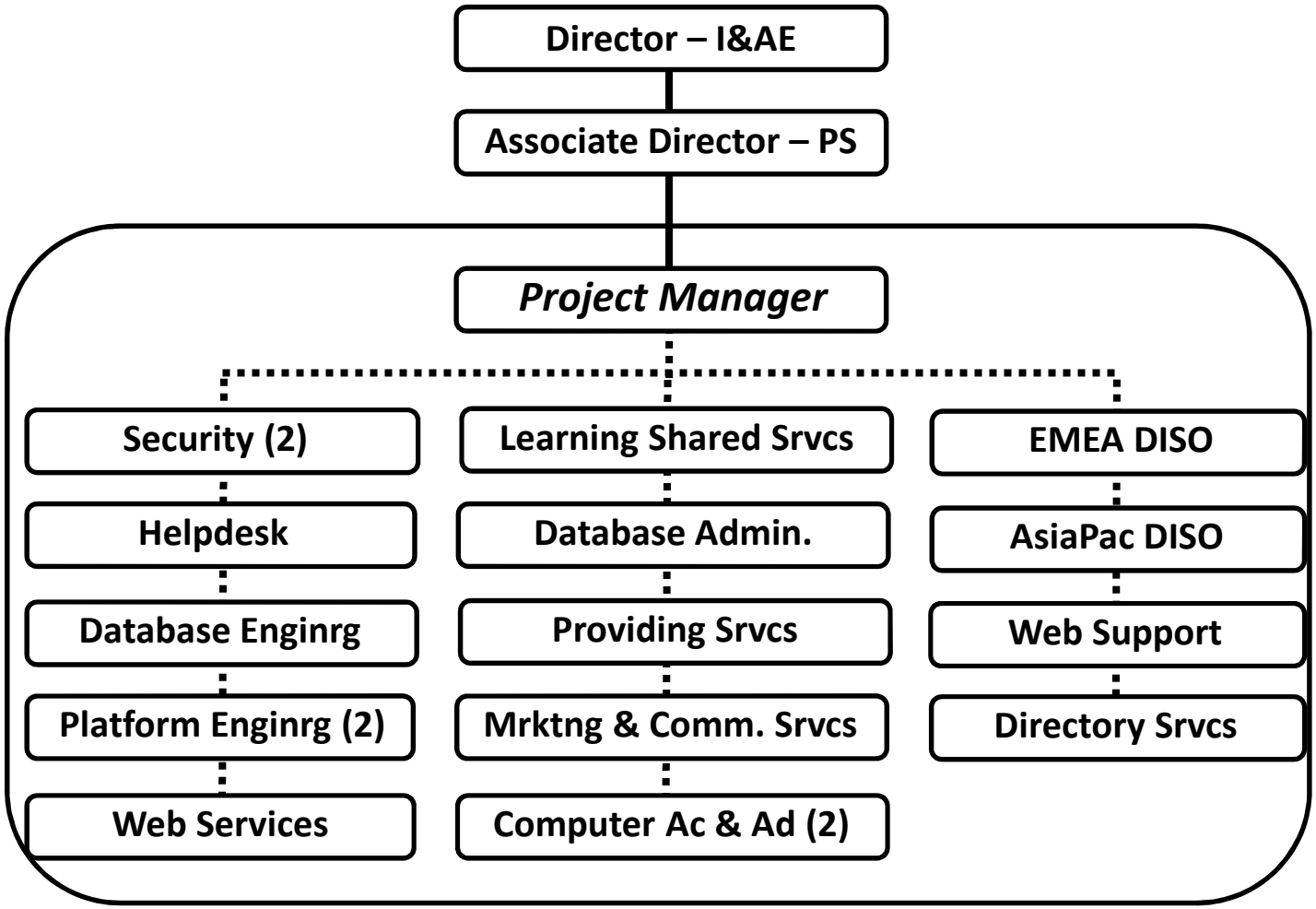
- Provide input, feedback, and recommendations for enhancing the eProvide II GUI and its functionality. (171)

Extended Team

- Forward all bi-weekly project status information and other communications within each GSS Stakeholder group. (23)

Project Portfolio Strategic Alignment Case Study #1: The Life Sciences

GSS eProvide II Core Project Team



Project Portfolio Strategic Alignment Case Study #1: The Life Sciences

Key Interim Deliverables Status Chart

Deliverable	IT Architect Says	A.D.-P.S. Says
A system that is ready for ARF application migration.	DONE (except for the production environment which is still OPEN.)	We still need to close the production environment.
Connectors for LDAP and Oracle are configured using SSL.	DONE	DONE
The Provisioning application repository & a new Administrative tool.	The Repository is DONE, but the new Administrative Tool is still OPEN.	We still need to close the Administrative Tool.
The IA&M User Repository populated w/ Directory entries.	DONE (except for execution of the E.D. recon which is still OPEN.)	We still need to close the E.D. recon.
Three (3) company default workflows.	DONE	DONE
An Approval & Administrative Console.	DONE	DONE
Two Oracle apps w/ automated account creation via IA&M Tool in UAT & DEV.	PC Image is DONE, BroqTine is still OPEN.	We still need to close BroqTine.

Project Portfolio Strategic Alignment Case Study #1: The Life Sciences

GSS eProvide II Core Project Team

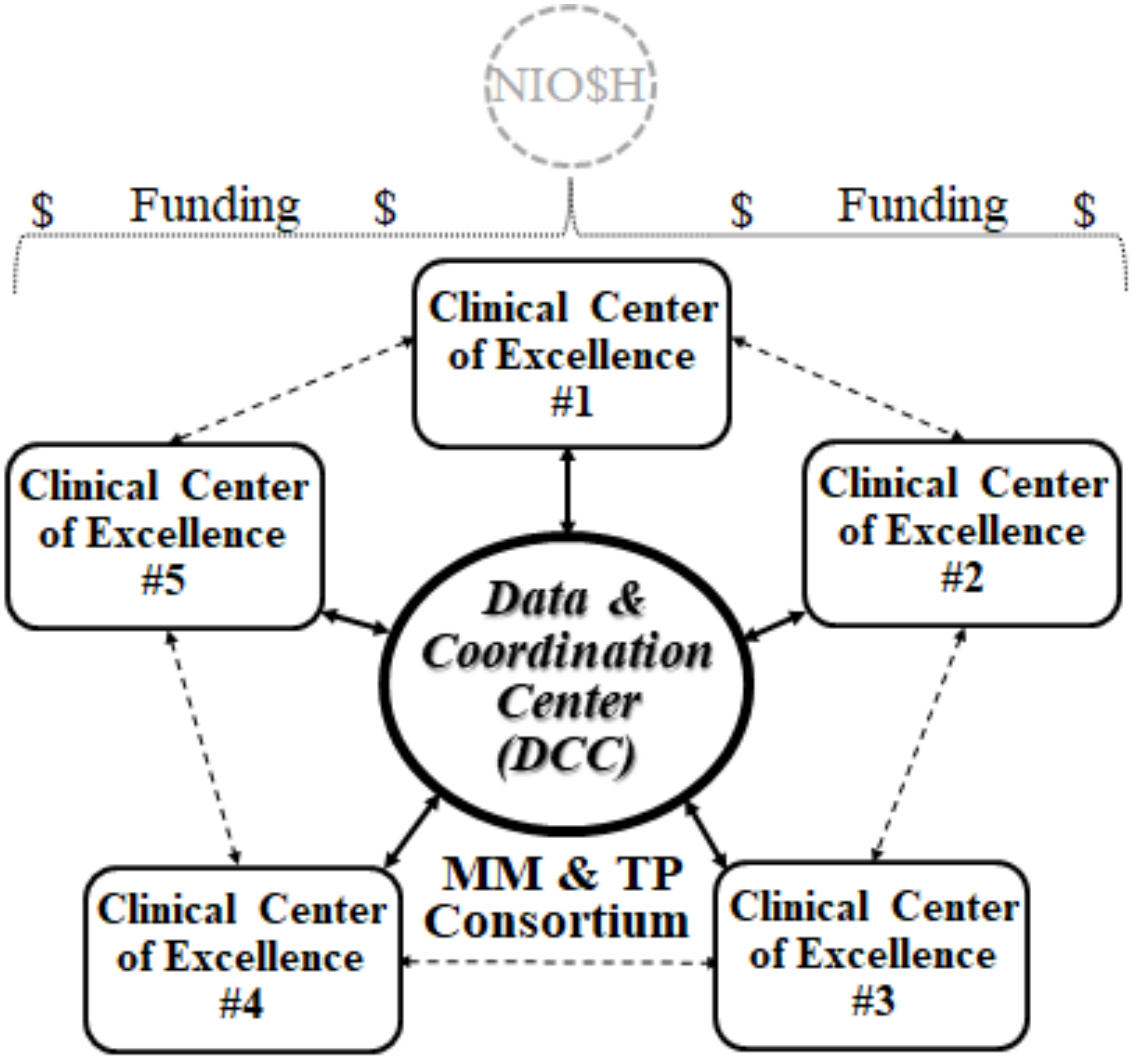
Project Portfolio Strategic Alignment Case Study #2: Public Health

MM & T Program Consortium DCC

Item	Description
Organization	The Data & Coordination Center (DCC) of a Medical Monitoring & Treatment Program Consortium housed in the Preventive Medicine Department of a School of Medicine with responsibility for coordinating five (5) geographically-dispersed Clinical Centers of Excellence (CCoE).
Sponsor	DCC Principal Investigator (PI) for a NIOSH-sponsored Consortium Research Grant
Primary Objective	To complete an extensive back-log of projects that had been promised in its annual progress reports and funding-renewal proposals, with some commitments pending fulfillment from the previous 5 years; continuation of the grant was in jeopardy.
Proposed Solution	To create the "DCC Program Manager" position and recruit a Project/Program Management and Lean Six Sigma expert with deep experience in facilitating cross-functional, project teams; " OneDCC"
Deliverables	Fulfillment of the following for the DCC: • Its nine (9) "Original Aims"; six (6) "Year #5 Aims"; four (4) "Year #5 Administrative Supplement/Extension Period Aims"; and, • All fifty-nine (59) of the prioritized Projects as contained in the Center's Master Portfolio Plan: Phases I, II, and III

Project Portfolio Strategic Alignment Case Study #2: Public Health

MM & TP Consortium DCC



Project Portfolio Strategic Alignment Case Study #2: Public Health

DCC Organizational Chart

Provide co-governance for the Consortium and oversight for the DCC Core Teams.

DCC Leadership Core

Principal Investigator
Deputy Director – Clinical Op's & Reporting
Deputy Director – Data Mgmt & Reporting
Program Manager (0.2 FTE)

Health Outcomes Core
Program Manager (0.2 FTE)

- Coordinate Epidemiology, Biostatistics, Data Cleaning, Analysis & Reporting

Clinical Coordination Core
Program Manager (0.2 FTE)

- Coordinate the Policies & Procedures of the 5 Clinical CoE's

Outreach & Retention Core
Program Manager (0.2 FTE)

- Coordinate Consortium Outreach & DCC Phone Bank

IT/Data Management Core
Program Manager (0.2 FTE)

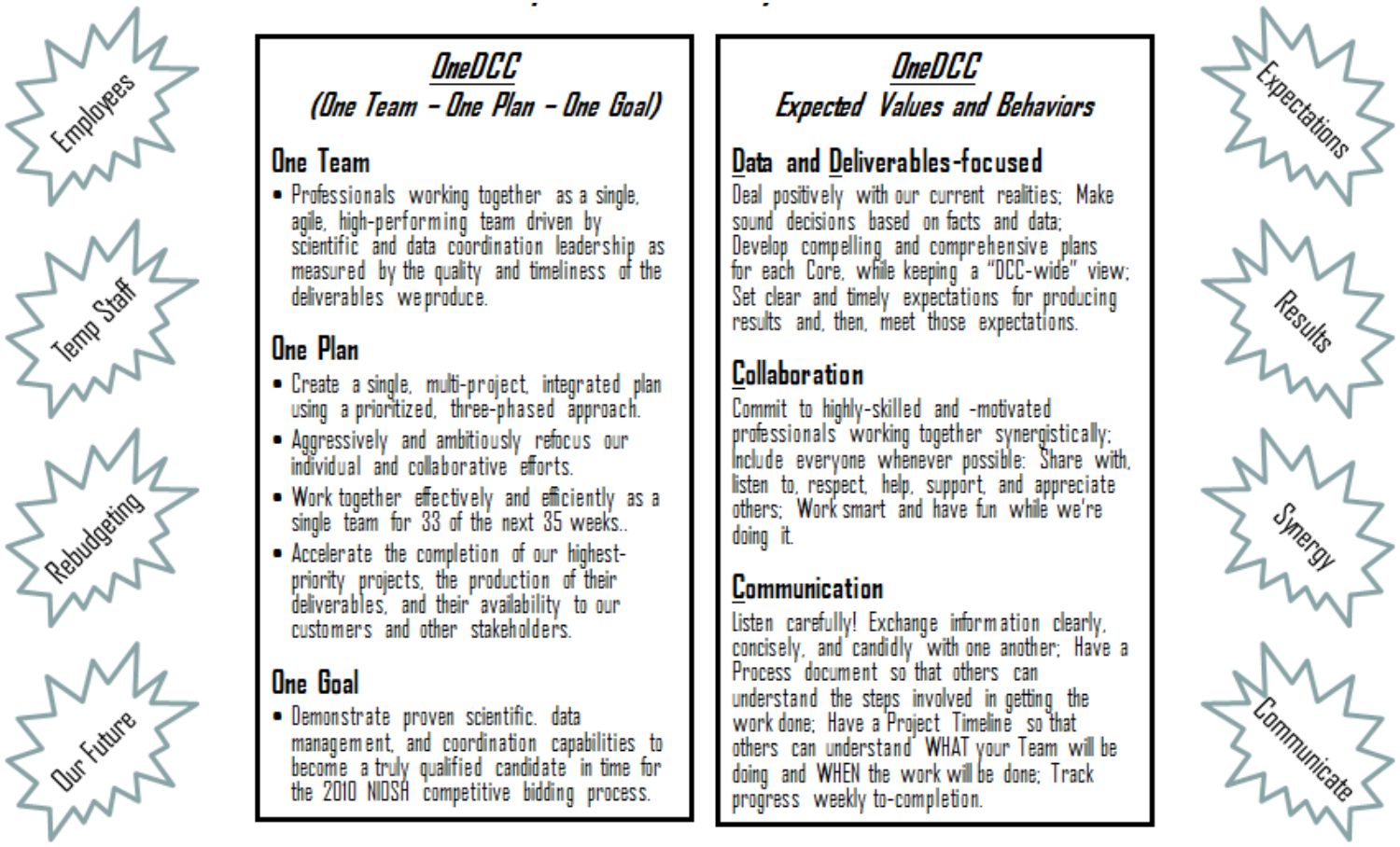
- Coordinate Infrastructure and Operational Data & Reporting

Program Support

- Oversee all DCC HR, Grant, Financial & Facilities Mgmt

Project Portfolio Strategic Alignment Case Study #2: Public Health

OneDCC Going Forward Plan



Highest Priority Projects
Phase I: Sept 28 – Dec 18, 2009
(12 weeks)

High Priority Projects
Phase II: Jan 4 – Mar 26, 2010
(12 weeks)

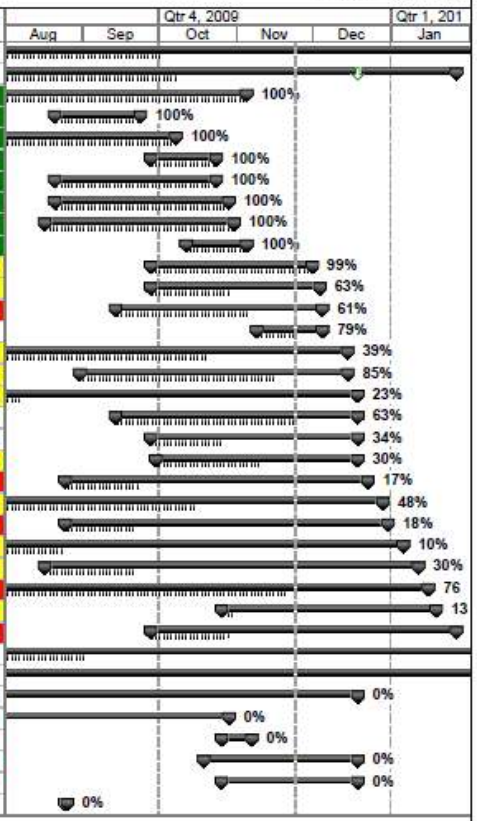
Lowest Priority Projects
Phase III: Mar 29 – May 28, 2010
(9 weeks)

Project Portfolio Strategic Alignment Case Study #2: Public Health

OneDCC Going Forward Plan

Director/P.I.: Dr. — OneDCC Phase I Summary Tracking Chart — As Of: 11/24/09

ID	Task Name	Target Start	Target Finish	Rev/Act Finish
1	OneDCC 2009-2010 MULTIPROJECT INTEGRATED TIMELINES	3/23/09	1/5/10	5/28/10
2	PHASE I (Highest Priority Projects: 9/28 - 12/18/2009)	3/23/09	1/5/10	1/26/10
3	COMPLETED PROJECTS-TO-DATE	9/28/09	12/18/09	11/4/09
4	Mental Health Questionnaire Into DB Project	8/21/09	9/23/09	9/23/09
38	Sleep Apnea Protocol Project	6/15/09	10/7/09	10/7/09
46	SOP for Publications Project	9/28/09	10/23/09	10/23/09
54	Datasets Inventories Project	8/21/09	10/16/09	10/23/09
59	Missing Consents Location and Entry Project	8/21/09	10/20/09	10/29/09
88	Quality of Spirometry Manuscript	8/17/09	10/30/09	10/30/09
92	November e-Newsletter	10/12/09	12/4/09	11/4/09
102	V1 DE + Cleaning Quality Check Project	9/28/09	10/20/09	11/30/09
110	Disease Surveillance Working Group Projects	9/28/09	11/30/09	12/3/09
129	Phone Bank Script Revisions Project (Integrate w/ ID #243)	9/14/09	11/9/09	12/4/09
140	December e-Newsletter	10/12/09	12/4/09	12/4/09
150	MH Analytic Datasets Project	3/23/09	12/14/09	12/14/09
161	Customer Service Model Project	8/31/09	10/26/09	12/14/09
174	DIS Data Entry Project - Phase I Deliverables Only	6/1/09	12/18/09	12/18/09
203	Retention Letter Project	9/14/09	12/16/09	12/18/09
210	Analytic Datasets for Phase I Manuscripts Project	9/28/09	12/18/09	12/18/09
215	Elegibility Refinement Project	9/30/09	12/18/09	12/18/09
227	Phone Bank Functions Migration Project (Integrate w/ ID #129)	8/25/09	12/22/09	12/22/09
266	Produce a V2/V3 Datasets Project	6/1/09	12/28/09	12/28/09
300	Data Entry Project - Phase I Deliverables	8/25/09	12/30/09	12/30/09
325	IRB Compliance Project	7/13/09	1/5/10	1/5/10
375	Pulmonary Working Group Projects	8/17/09	12/28/09	1/11/10
391	Mental Health Working Group Projects	9/11/09	11/19/09	1/15/10
425	Physical Health Working Group Projects	10/26/09	12/18/09	1/18/10
447	Exposure Assessment Manuscript Project	9/28/09	12/29/09	1/26/10
485	PHASE II (2nd Highest Priority Projects: 1/4 - 3/26/2010)	NA	NA	3/26/10
714	PHASE III (Lowest Priority Projects: 3/29 - 5/28/2010)	NA	NA	5/28/10
864	POOL OF PROJECTS THAT MUST BE PRIORITIZED & INSERTED BY PHASE ABOVE	NA	NA	12/18/09
865	Consolidation of SQL Server Databases Project (DM Revise)	4/27/09	10/28/09	10/28/09
943	Update the Frozen Dataset to 9/11/2009 Project	10/26/09	11/6/09	11/6/09
949	Data Request Forms and Process Improvement Projects	10/19/09	12/18/09	12/18/09
957	Consolidate All Data Dictionary Modules	10/26/09	12/18/09	12/18/09
960	Pulmonary Work Group Projects	NA	NA	8/25/09



Multiproject Timelines (Phase I)

Shaded Green = Done! — Shaded Yellow = Caution! — Shaded Red = Danger!

Project Portfolio Strategic Alignment Case Study #2: Public Health

OneDCC Going Forward Plan Project Team

Project Portfolio Strategic Alignment Case Study #3: State Government

The State of New Nirvana ITO PMO

Item	Description
Organization	The Project Management Office of the Information Technology Office for the State of New Nirvana.
Sponsor	Chief Information Officer
Primary Objectives	• To coordinate and/or guide state-wide initiatives that require across-the-board support from ITO in the State of New Nirvana. • To guide and mature processes surrounding Project Portfolio Management (PPM), Key Performance Indicators (KPIs) within the portfolio, and, ultimately, to coordinate decisions inherent to PPM.
Proposed Solutions	To perform continuous improvement via the use of a standardized approach to Project Management and promote the sharing of best-practices and guidance.
Deliverables	To result in improved project management practices and sustainable adoption throughout the State of New Nirvana.

Project Portfolio Strategic Alignment Case Study #3: State Government

"From Ideas to Reality in the State of New Nirvana ITO"

Project Portfolio Strategic Alignment Case Study #3: State Government

The State of New Nirvana ITO PMO

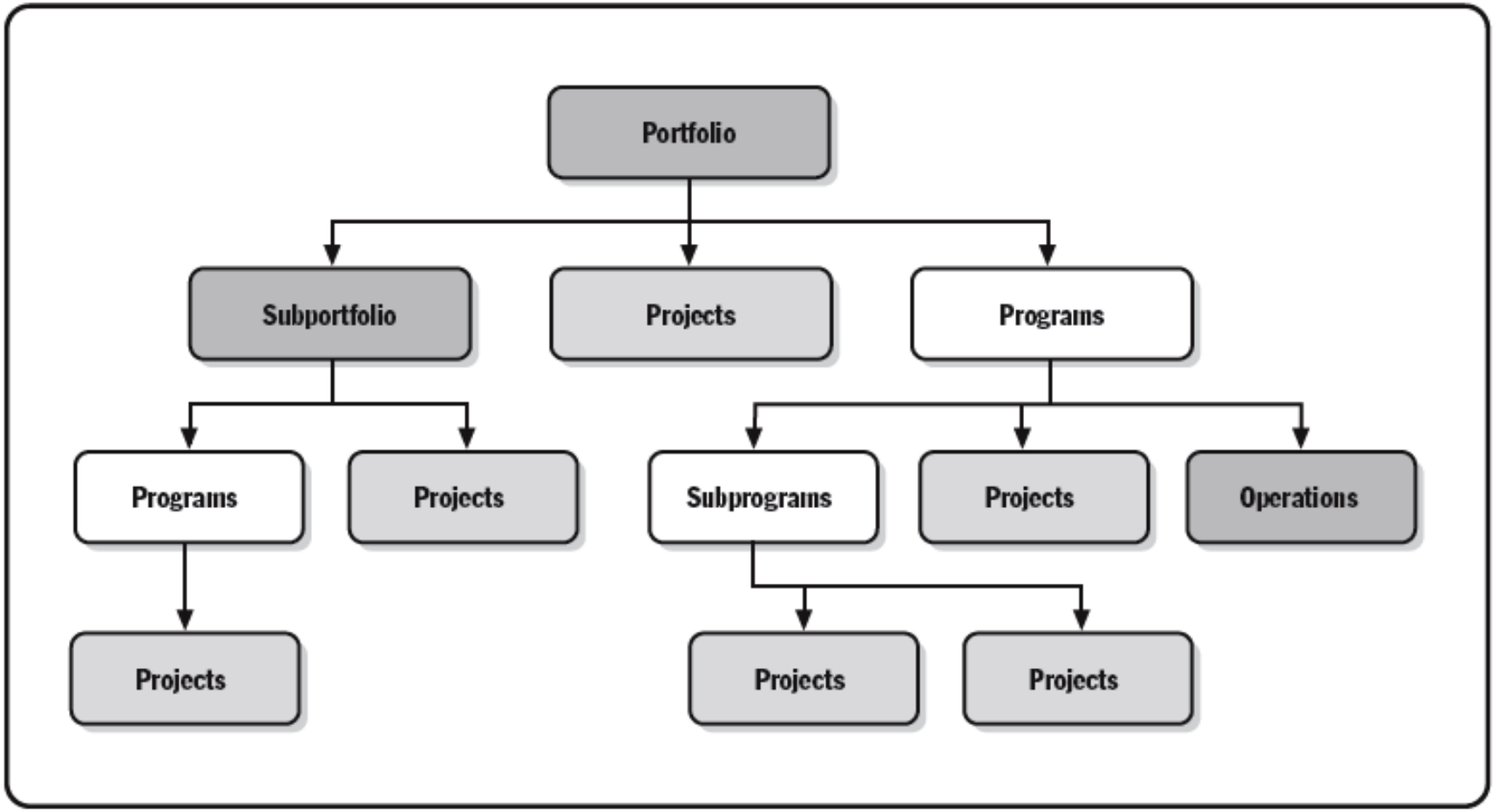
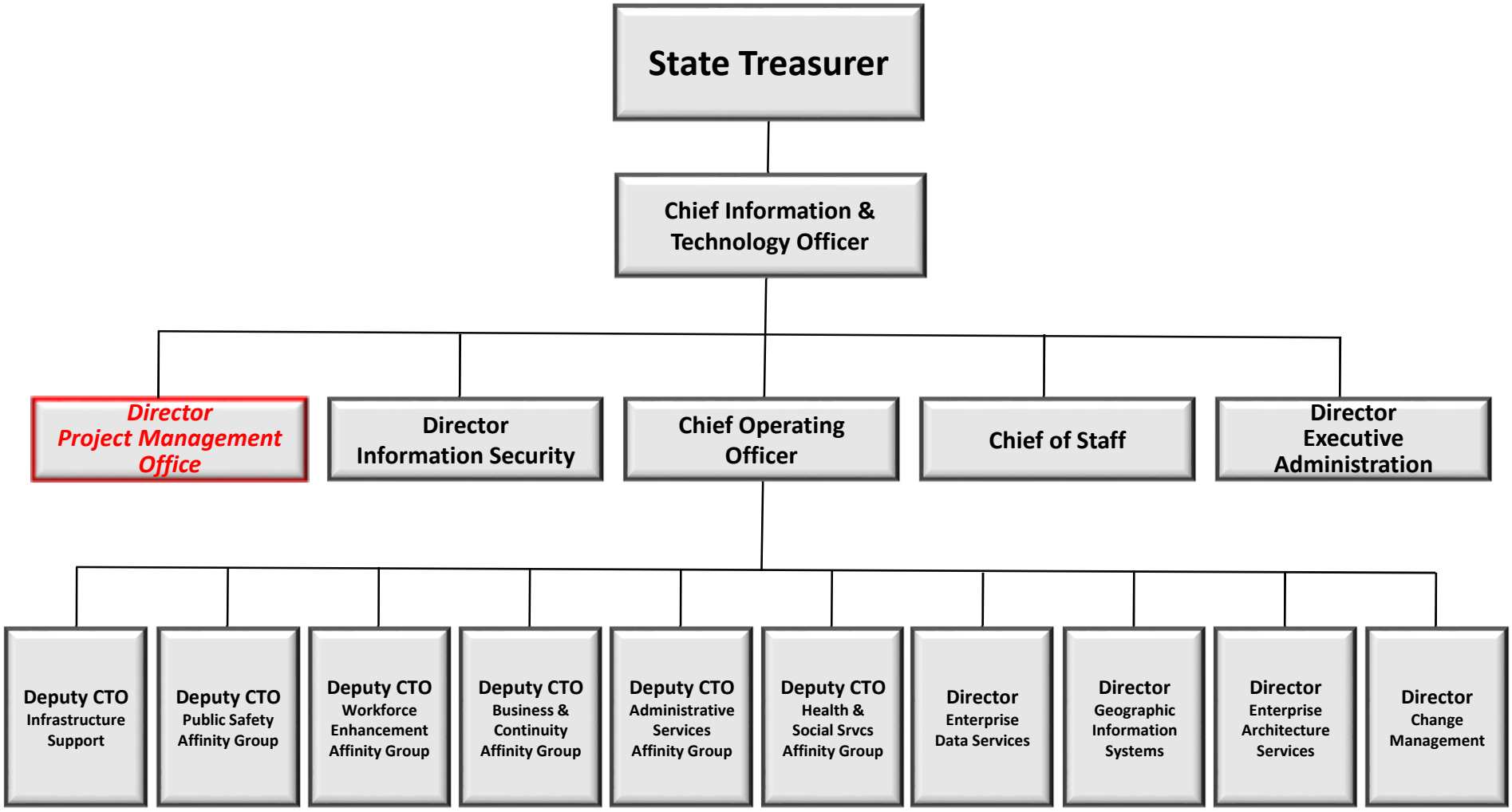


Figure 1-1. Portfolios, Programs, and Projects – High-Level View

* - *PfMBOK® Guide*, 3rd Edition, p. 3, © 2013 - Project Management Institute

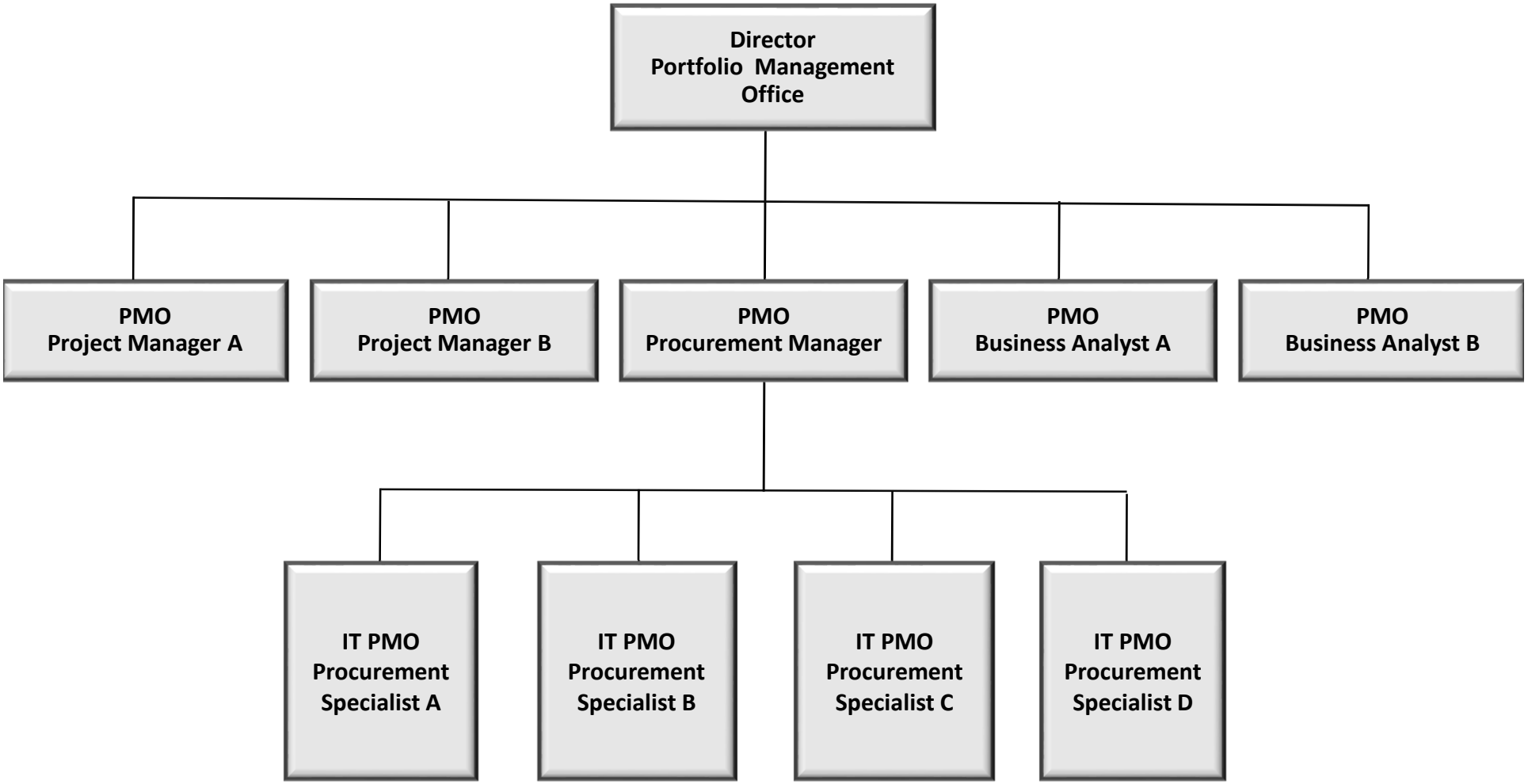
Project Portfolio Strategic Alignment Case Study #3: State Government

The State of New Nirvana ITO PMO



Project Portfolio Strategic Alignment Case Study #3: State Government

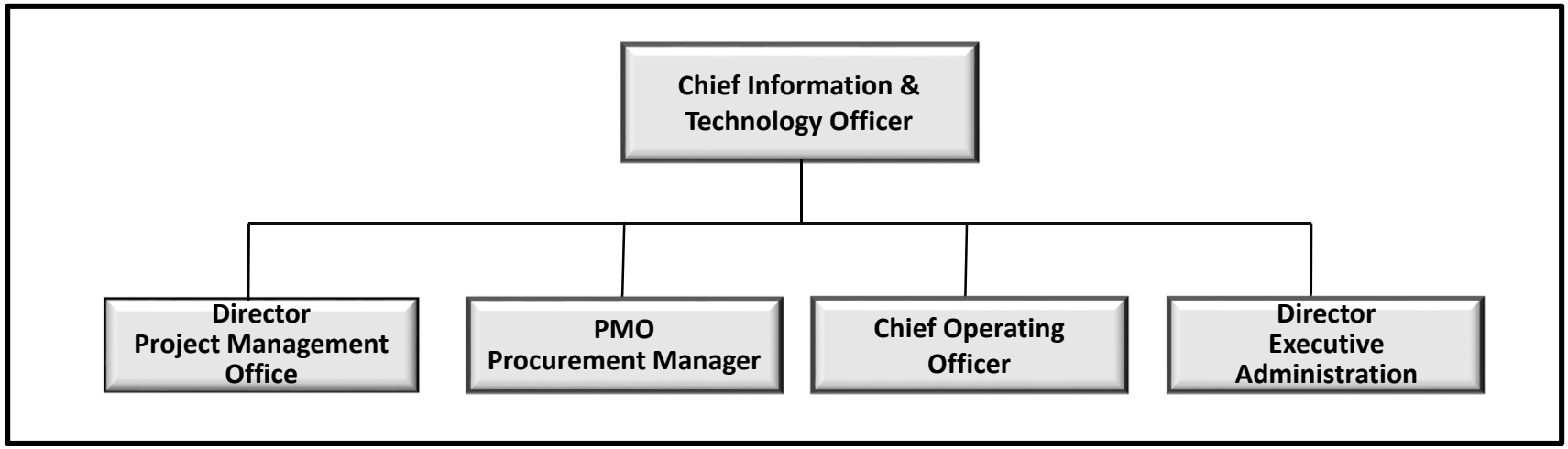
The State of New Nirvana ITO PMO



Project Portfolio Strategic Alignment Case Study #3: State Government

The State of New Nirvana ITO PMO

Portfolio Development Team & Project Steering Committee



NN ITO PMO Project Status Report Format Using MS® Excel

Portfolio Number	Tactical Plan #	Project Name	Dept.	Steering Committee? Y/N	ITO PMO PM	ITO PMO BA	Spent to Date	Completed Gates	Current Phase	Deliverables Status	Risks/Issues & Recommended Action Steps	LAST MONTH STATUS	Last Week Status	This Week Status

“Aligning Your Project Portfolios Strategically”

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