Using Confluence for Project Portfolio Management at New York University

DLF PM Group, Fall 2008. vinopal@nyu.edu
What is Project Portfolio Management?

analyzing and collectively managing a group of current or proposed projects based on numerous key characteristics.

Who Does Project Portfolio Management?

Leadership Team for Academic Technology @ NYU

- .edu Leadership team
- Digital Library Technology Services
- ITS - Faculty Technology Services
- ITS - eServices (Apps & Systems)
- ITS - Student Technology Services

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What Do We Do?

- Evaluate potential & current projects
- Prioritize
- Allocate resources
- Review project status, problems
- Resolve issues
- Report down, up and out

Need processes and tools to do so
How Would a Portfolio Management Tool Help?

- List all current and proposed projects
- List (un)available resources
- Run staffing / cost scenarios for proposed projects
- Send notifications on project status / problems
- Run reports on various criteria in various ways

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We Don't Have a Tool.

- Wiki for documentation
- Home-grown PM tool ONLY for project status
- Spreadsheets for staffing scenarios & tracking
- Individual's choice for PM support

No way for Leadership Team to see the whole picture
How Do We Evaluate and Prioritize?

- Is there demand?
- IT viability?
- Strategic alignment?
- Available resources?
- Costs clear?
Project Proposal Process

- Anyone can submit a project proposal
- Fill out template in wiki
- Project cycle:
  - 3 semesters/year: Fall, Spr, Sum
  - Proposals 2 months before semester start
# Project Proposal

Added by Barbra Mack, last edited by Barbra Mack on Nov 04, 2008 [view change]

<table>
<thead>
<tr>
<th>Request Summary</th>
<th></th>
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</thead>
<tbody>
<tr>
<td>Proposed By (client/staff member requesting the project):</td>
<td>Department:</td>
</tr>
<tr>
<td>Submitted By (the staff member submitting this proposal):</td>
<td>Department:</td>
</tr>
<tr>
<td>Requested Completion Date:</td>
<td>Reason for Requested Date:</td>
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<tr>
<td>Proposal Priority:</td>
<td>Explanation for Priority:</td>
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</table>

## Project Proposal Description:
[general description of the proposal and its goals]

## Needs Statement:
[Why do we need to do this project? Clearly articulate the technical, community, political, and/or economic factors that would motivate the project.]

## Perceived Risks/Challenges:
[Risks and challenges could be wide ranging. Some example include: no funding for the size of project, lack of required staff, lack of required skillset within staff, doesn’t fit within .edu’s services, risky IT viability (e.g., not enterprise scalable), etc.]

## Proposed Deliverables:
[In this area identify the type of work that would be needed to complete this project. Just a bulleted list of tasks is sufficient if your time is limited.]

## Leadership Team's Assessment:

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Project Evaluation by Leadership

1. Project Requestor
   - Present request
   - Write proposal

2. Leadership Team
   - Consider proposed project

3. Project have potential?
   - Yes
     - Leadership Team
     - Forward project
   - No
     - Leadership Team
     - Set project

4. Is the demand clear?
   - Yes
     - Leadership Team
     - Assign staff to assess demand
     - [Assessment Team]
     - Determine need
   - No

5. Is there a demand?
   - Yes
     - Leadership Team
     - Assign staff to assess viability
     - [Assessment Team]
     - Determine need
   - No

6. Is the IT viability clear?
   - Yes
     - Leadership Team
     - Assign staff to assess viability
     - [Assessment Team]
     - Determine need
   - No

7. Does it strategically align?
   - Yes
     - Leadership Team
     - Assign staff to determine costs
     - [Assessment Team]
     - Determine costs
   - No

8. Are the costs clear?
   - Yes
   - Leadership Team
   - Assign staff to determine costs
   - [Assessment Team]
   - Determine costs
   - No
   - Leadership Team
   - Assign staff to determine costs
   - [Assessment Team]
   - Determine costs

9. Are the resources available?
   - Yes
   - Leadership Team
   - Assign staff to determine costs
   - [Assessment Team]
   - Determine costs
   - No
   - Leadership Team
   - Assign staff to determine costs
   - [Assessment Team]
   - Determine costs

10. Does project still have potential?
    - Yes
    - Leadership Team
    - Put Project on Hold
    - No

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Project Approval by Leadership

- 1 month before semester start
- Notify project managers and project team members
- Project Snapshot into wiki
  - available to project staff
  - available to management
  - document milestones, major decisions
Project Snapshot in Wiki

Project Summary

General Information

<table>
<thead>
<tr>
<th>Project Title</th>
<th>Project ID</th>
<th>ITSXXXX</th>
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<tbody>
<tr>
<td>Completion Date</td>
<td>Strategic Alignment</td>
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<tr>
<td>Sponsoring Organization: .edu</td>
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<tr>
<td>Project Manager</td>
<td>Document Version: 1.0</td>
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Objective

[WHAT do you want to accomplish, and WHEN? This could be a one-sentence SMART (Specific, Measurable, Applicable, Realistic, Time-bound) goal that focuses on a measurable, clear objective that can be accomplished by the end of the semester]

Project Description

(Drawback: long-distance communication)
Conclusion 1

Wiki:
- good for linear documentation
- static data (can't repurpose)
- limited layout capabilities
- bad for helping PM organize and plan
- bad for reporting

Home-Grown tool: unsatisfactory
Conclusion 2

- Currently seeking PM tool to handle:
  - Project Portfolio Management
  - Project Management
  - Reporting

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Conclusion 3

Project Lifecycle Process in development:
- proposal
- evaluation
- initiation
- project management
- portfolio management
- transition to production service