

Thank you for joining EAB's Project Management Functional Collaborative Midpoint Webinar. We will begin the conversation at 4:03 pm Eastern.



EAB

IT Forum

# Project Management Functional Collaborative

A Midpoint Update On Our Direction and Deliverables

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- PM Leaders' Top 10 Issues
- IT Forum Research Available Today
- Preview of Upcoming Research on Your Behalf

February 25<sup>th</sup>, 2019



# 50+ Project Management Leaders

## **University of Wisconsin-Milwaukee**

Dale Matenaer

## **Gallaudet University**

Rick Baker

## **University of the Fraser Valley**

Geoff Hewson

## **Purdue University Northwest**

Carol Coupet

## **Kansas State University**

Ashley Wondra

## **University of Exeter**

Nathan Burden

## **Vanderbilt University**

Stan Tharpe

## **Sam Houston State University**

Kevin Hammel

## **Bowdoin College**

Amy Kerr

## **University of Connecticut**

Ngozi Taffe

## **George Washington University**

Loretta Early

## **Columbia College, Chicago**

Anna Seledon

## **University of Wisconsin-Madison**

Karen Hanson

## **University of Texas Rio Grande Valley**

Jeff Graham

## **Northern Kentucky University**

Bert Brown  
Darla Pangburn

## **Embry-Riddle Aeronautical University**

Kathy Quinto

## **Barry University**

Wesley Ng-A-Fook

## **Pepperdine University**

Rita Schnepf

## **Virginia Tech**

Gregory Kroll

## **University of Nevada, Las Vegas**

Karen Asquith

## **University of Delaware**

Li Lin

## **Wilfrid Laurier University**

Andres Diaz

## **Webster University**

Greg Malone

## **Xavier University**

Hope Hayes

## **Colorado State University**

David Hoffman  
**University of Missouri St Louis**  
Wayne North

## **Gonzaga University**

Stephanie Schut

## **Ball State University**

Mark Watters

## **Utah Valley University**

Brett McKeachnie

## **Trinity University**

Fred Zapata

## **Hardin-Simmons University**

Travis Seekins

## **University of Denver**

Elizabeth Parker  
Donna Hays

## **University of Maryland – Baltimore County**

John Fritz  
Joe Kirby

## **Carleton College**

Sara Oster

## **University of North Dakota**

Jake Chaput

## **University of Texas Rio Grande Valley**

Esther Dominguez

## **Columbia College, Chicago**

Anna Seledon

## **Mississippi State University**

Sharon Breckenridge

## **Dickinson College**

Jill Forrester  
Sarah Burkett

## **University of Nevada, Reno**

Burcak Erenoglu

## **Simon Fraser University**

Jennifer Casey

## **Rider University**

Theresa Hvidsock

## **Central Michigan University**

Darcie Wilson

## **Drake University**

Keren Fiorenza

## **Suffolk University**

Marian Sales

Daniel Rystrom

## **Georgia Southern University**

Jason Williams

## **Babson College**

Deborah Wahlen

## **Duquesne University**

Robert Goffeney

## **Colorado School of Mines**

Clayton Durkee

## **San Francisco State University**

Andrew Roderick

## **University of Illinois, Urbana-Champaign**

Troy Gagne

# Kick-Off Conversations Breakdown



70%

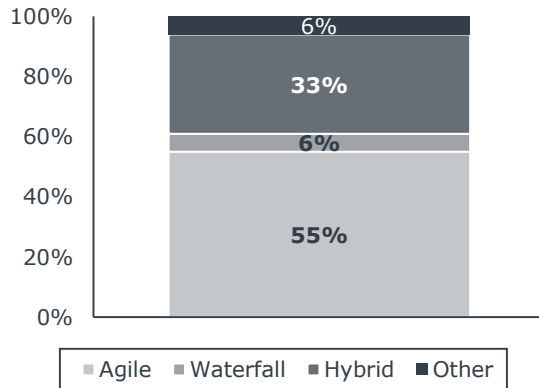
Of collaborative participants state project prioritization is a problem



32%

Of PMOs are younger than 3 years old

## Alternate Methodologies



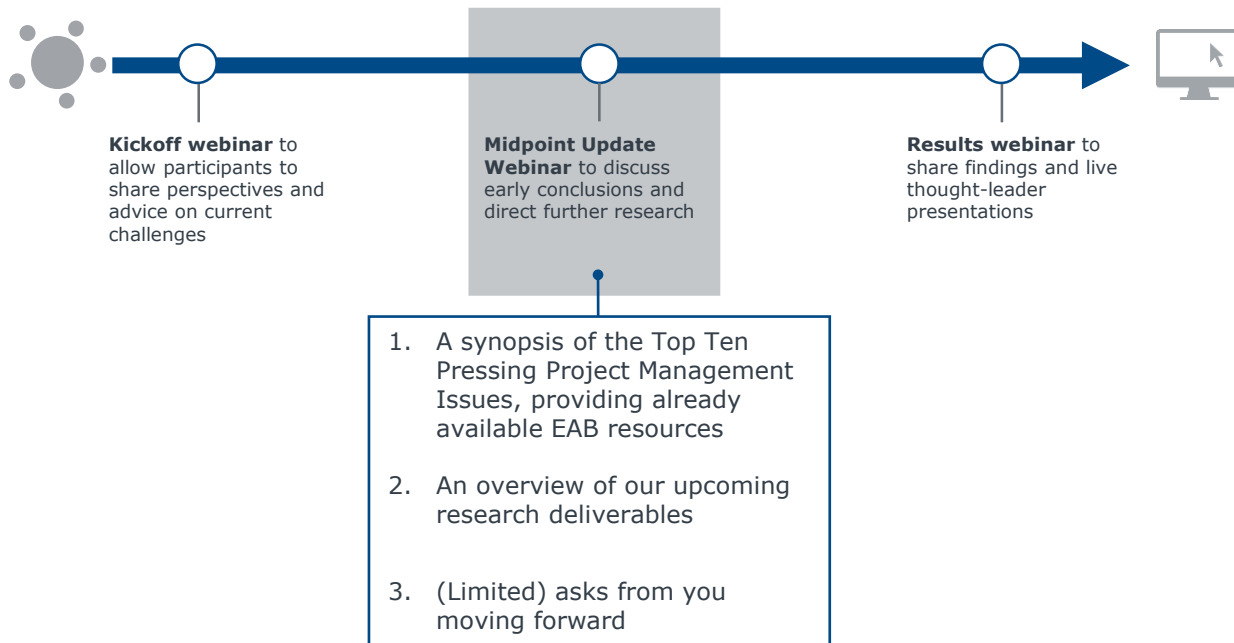
## Technology Solutions

1. TeamDynamix
2. ServiceNow
3. Project Online
4. ProjectManager.com
5. Other

# Moving Forward with Research For You



## Timeline of a Functional Collaborative





# PM Leaders' Top 10 Issues

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# Top 10 Most Pressing Project Management Issues



What's Keeping Project Managers Up At Night?



## Project Resource Allocation

- 1 Project Intake and Processing
- 2 Project Prioritization
- 3 Assigning Project Management Resources
- 4 Cross-Institutional Resource Planning



## The Project Manager's Toolkit

- 5 Technology Tools
- 6 Methodologies
- 7 Next-Generation Project Management Practices



## Project Management in the Institution

- 8 Marketing the Value of Project Management
- 9 Project Management Talent Development
- 10 Organizing the Project Management Office

# Project Resource Allocation

## Project Intake and Processing

- How do we design project submission processes that customers know about, understand, and employ?
- How do we obtain a complete view of all institutional project requests?
- “We do not have a one stop form for people to go and request a project. No one realizes there are multiple of the same request.”

## Project Prioritization

- Where project demand exceeds resources, how do we choose which projects to undertake, and in what order?
- How do we protect prioritization processes from cheating and evasion?
- “We have a group for go no go but when projects are a go how do we prioritize them?”

## Assigning Project Management Resources

- What are best practices for matching project requests with appropriate PM expertise?—full time, part-time, consultative
- How can we prevent role creep and endless PM “ownership”?
- “For people who don’t like to do any kind of project management, how do you do ‘just enough’ project management to get the job done?”

## Cross-Institutional Resource Planning

- How can PMs assemble a complete picture of resources available for assignment to projects?
- How can cultural resistance to time and resource tracking be overcome?
- “When you have a new project coming in, how are you able to tell if you have available resources? We can’t.”



## Technology Tools

- How do we select PM tools that can draw information from many sources, track project progress, and manage constant change?
- What tactics will help drive partner adoption of enterprise PM tools?
- "We think we're ready for a PPM tool. Leadership is pushing for the tool while industry best practices say develop governance first. I am currently stuck in the middle."

## Project Management Methodologies

- How can project managers adapt traditional methodologies to an evolving development environment? Should they press for change?
- Agile v. Waterfall? Do you need to choose, or is "Wagile" the correct way forward?
- "We need assistance in making the shift from Waterfall to Agile. Our stakeholders have read about the benefits of Agile and are pushing for the change."

## Next-Generation Project Management Practices

- As IT shifts to the cloud, how do PMOs respond to increased demands to track and optimize vendor performance?
- What is the PMO's role in digital transformation and institutional strategy?
- "Digital transformation is not just upgrading capabilities but fundamentally changing our customers' value proposition. How do we support that from a process creation and culture change perspective?"

# Project Management in the Institution



## **Marketing the Value of Project Management**

- How should PM standard practice be adapted to fit the cultural realities of higher education?
- How are PMOs best able to demonstrate the value of PM best practices and incentivize their adoption within IT and the wider institution?
- “How do you break the reputation that project managers are simply coordinators, schedulers, etc., rather than strategic partners that work together with the project owner, sponsors, and team to strategize and execute the best way?”

## **Project Management Talent Development**

- How do PM leaders more effectively recruit talent and overcome the structural disadvantages they face in IT talent markets?
- What tactics can be adopted to make use of alternative staffing models and professional development?
- “A pain point for us is recruiting project managers who are good enough for the salaries we can afford to pay.”

## **Organizing the Project Management Office**

- What is the best design for a project management office serving IT in a higher education context?
- How does the PMO prove its value and achieve acceptance within the institution?
- “When central IT encompasses both administrative and academic computing, how can project management reflect (and respect) who's doing what -- and how?”



# IT Forum Research Available Today

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# Project Management Ideas and Practices

## Currently Available Resources from the IT Forum



### Resource Management Strategies



#### [Reducing Cycle Time Between Need and Solution](#)

*Identifying and addressing a campus's top technology priorities*



#### [Community Demand-Sensing Platform](#)

*This practice implementation intensive details how campuses can create a single online platform that centralizes conversations about technology needs.*



#### [Equipping IT for Integration at Scale](#)

*Improve institution-wide integration maturity through service prioritization and tool standardization*



### Project Management Office Culture and Staffing



#### [Information Technology Talent Recruitment:](#)

*Implementing Candidate-Centric Recruitment to Build Tomorrow's IT Organization*

**COMING SOON – Spring 2019**



#### [A Common Currency](#)

*Establishing data governance and creating a data-driven culture*

# Prioritization-by-Committee Breaks Down

## Ad Hoc Prioritization Process No Match for Flood of Projects

”

The committee has grown into this big, bloated thing with every VP and dean involved. It is too big to make decisions—there’s no way a group like that can prioritize projects.

CIO

William &amp; Mary

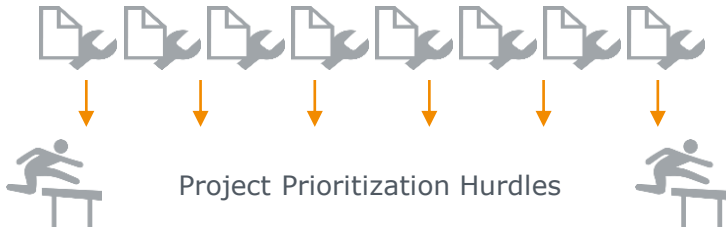
”

I submit my requests and never hear about them again. The committee is a black hole. Why bother with IT at all?

Dean

William &amp; Mary

80,000

Labor-hours of  
backlogged work

### Ad hoc

Due to a lack of explicit standards, the IT governance committee reviews every project with slightly different criteria, leading to frustration and confusion among end users

### Slow

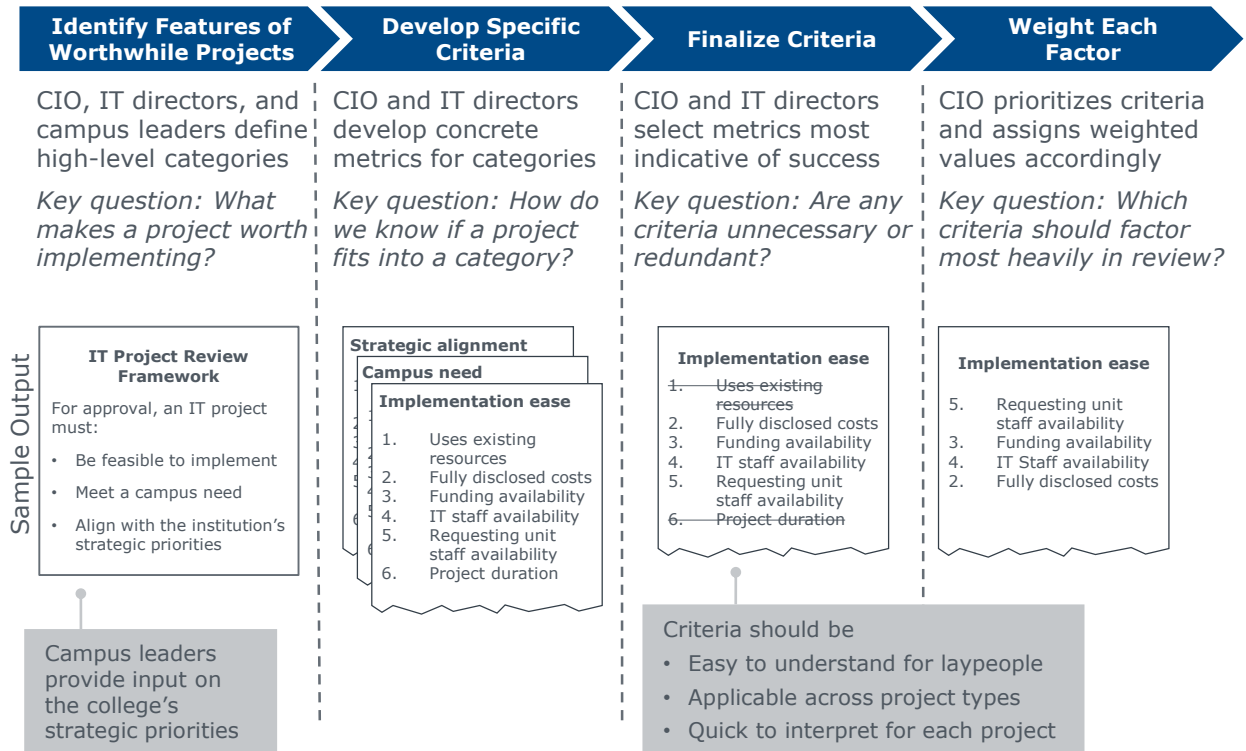
Absence of standards necessitates laborious project reviews that consume considerable time and bog down the approval process

### Personality-Driven

Projects with a particularly vocal sponsor are likely to get attention, irrespective of value to the community as a whole

# Taking the Lead by Resetting the Rules

## IT Team Standardizes Criteria to Streamline Project Review



# Breaking the Communication Barrier

## More Structured IT-Campus Communication Benefits Everyone

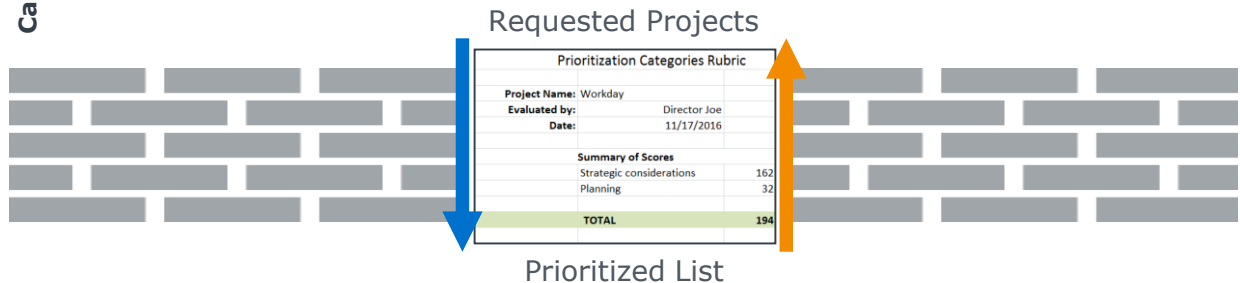
### Campus Benefits

#### ► Campus Members Understand Request Outcomes

"I know the status and prioritization of the request I submitted."

#### ► Campus Members Understand IT's Priorities

"I know why IT is working on what it's working on."



### IT Benefits

#### ► IT Can Say No without Compromising Campus Goodwill

"When a project is rejected, it's not my fault- it's the fair result of a scorecard that was collaboratively developed."

#### ► IT Knows What to Do First, Second, and Third

"I know what projects I need to provide resources for, and I know those projects will benefit the college."

# Playing Catch-up

## After Years of Underperforming IT, UAB Faces Its Challenges Head-On



### IT Struggling to Support the Campus

#### Six Years of Interim Leadership

- No clear decision maker
- Delayed projects
- Limited communication with campus stakeholders



*An indefinite holding pattern limits IT's effectiveness*

#### Pent-up Campus Demand

- Needs not met
- Requests unanswered
- Independent tech acquisition taking root



*"I've been asking for an easy fix to our telephone system for years!"*

#### Eager IT Staff

"The staff had waited six years to tackle projects that they were really excited about."



*The administration hires a new CIO to do a "hard reset" on IT*

### A New (IT) Day Dawns at UAB



"Dr. Curtis Carver will lead development of a transparent, high-performing central IT organization with a culture of providing first-rate customer service."

*Press Release, University of Alabama at Birmingham (May 2015)*

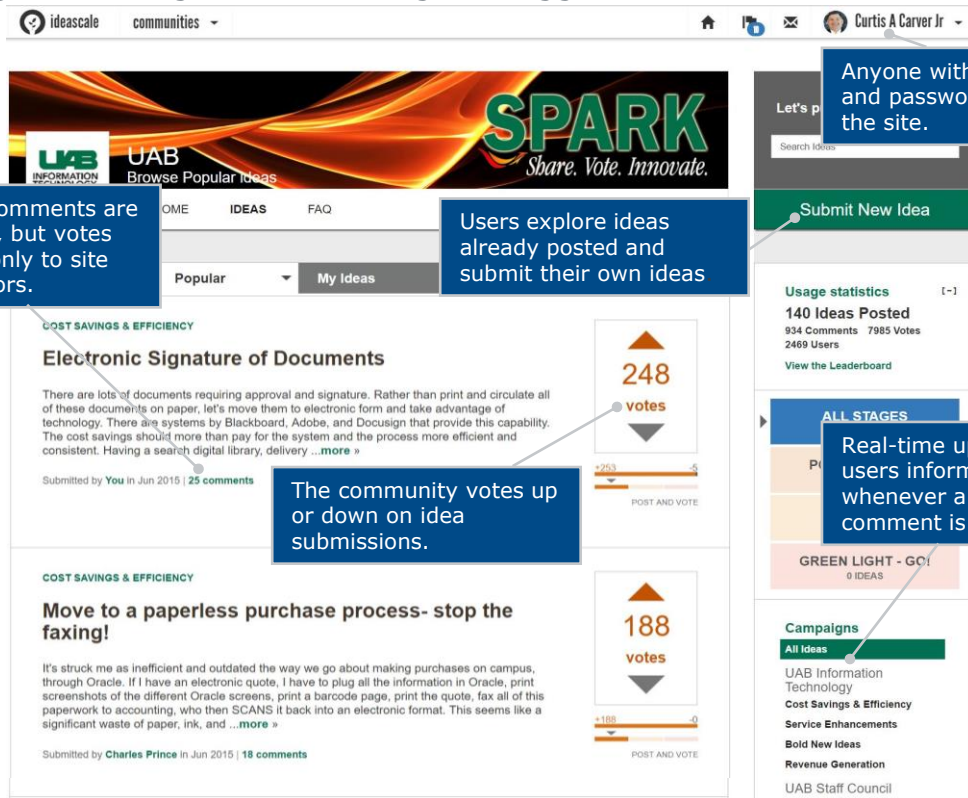
"We need to build an organization that is responsive and adaptive—and if we do that, we'll create a culture in which people want to participate."

*Dr. Curtis Carver, CIO, UAB*



# SPARK-ing a Conversation

## Opening the Floodgates with a Digital Suggestion Box



**ideascale** communities

UAB INFORMATION **UAB** Browse Popular Ideas

**SPARK** Share. Vote. Innovate.

OME IDEAS FAQ

Popular My Ideas

**Electronic Signature of Documents**

There are lots of documents requiring approval and signature. Rather than print and circulate all of these documents on paper, let's move them to electronic form and take advantage of technology. There are systems by Blackboard, Adobe, and DocuSign that provide this capability. The cost savings should more than pay for the system and the process more efficient and consistent. Having a search digital library, delivery ...[more](#)

Submitted by **You** in Jun 2015 | **25 comments**

**248 votes**

POST AND VOTE

**Move to a paperless purchase process- stop the faxing!**

It's struck me as inefficient and outdated the way we go about making purchases on campus, through Oracle. If I have an electronic quote, I have to plug all the information in Oracle, print screenshots of the different Oracle screens, print a barcode page, print the quote, fax all of this paperwork to accounting, who then SCANS it back into an electronic format. This seems like a significant waste of paper, ink, and ...[more](#)

Submitted by **Charles Prince** in Jun 2015 | **18 comments**

**188 votes**

POST AND VOTE

**Usage statistics** [-]

**140 Ideas Posted**  
934 Comments 7985 Votes  
2469 Users  
[View the Leaderboard](#)

**ALL STAGES**

**GREEN LIGHT - GO!**  
0 IDEAS

**Campaigns**

**All Ideas**

UAB Information Technology  
Cost Savings & Efficiency  
Service Enhancements  
Bold New Ideas  
Revenue Generation  
UAB Staff Council

Let's p  
Search Ideas  
Submit New Idea

Anyone with a UAB ID and password can enter the site.

Ideas and comments are attributable, but votes are visible only to site administrators.

Users explore ideas already posted and submit their own ideas

The community votes up or down on idea submissions.

Real-time updates keep users informed whenever a new idea or comment is posted.

# Crowdsourcing the Campus

## SPARK's Launch and Implementation Encourage Community Participation



### Introducing SPARK



#### Build it, and They Will Come

*Focus: Campus-wide Promotion*

- Initiative kick-off timed to coincide with the start of the school year
- Soft launch managed through 800 CIO-led meetings and 14 campus town halls
- Site populated with suggestions from IT staff so that it never looked empty

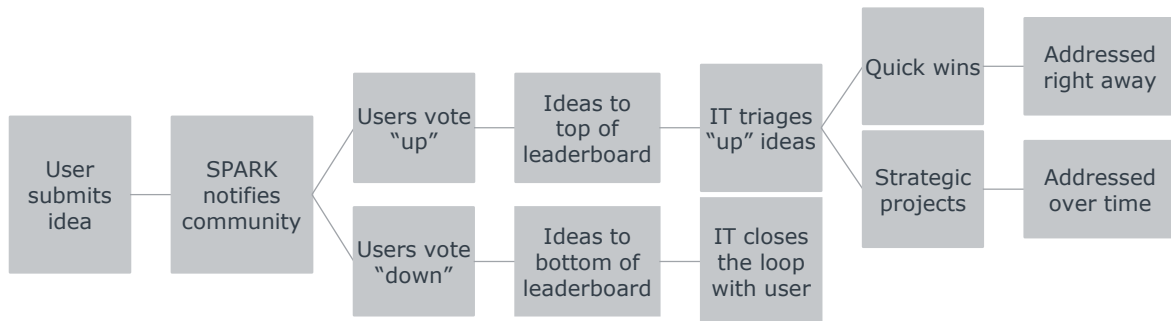
**\$20k**

Upfront funding required to license Ideascale's social media platform

**125**

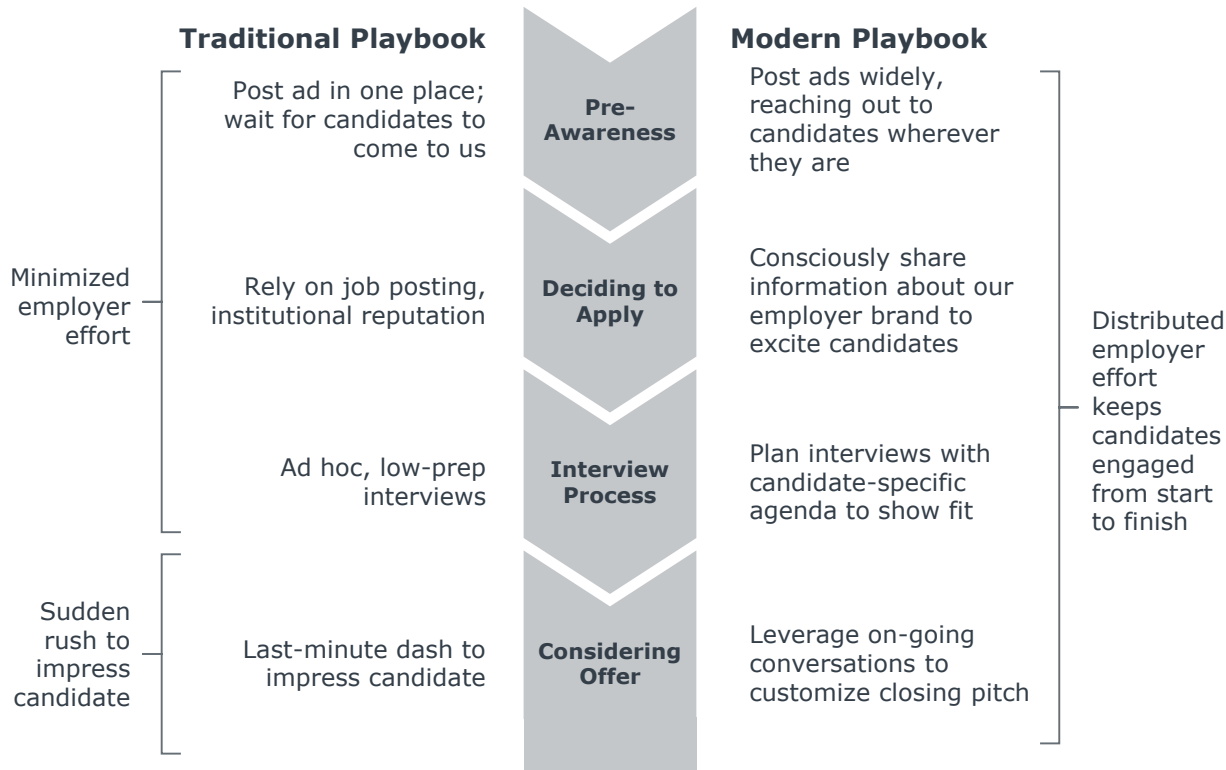
Number of IT suggestions submitted through SPARK in the initiative's first six months

### SPARK in Action



# Our Recruiting Playbook Hasn't Changed

## Out-of-Date Mindset About Recruiting Hobbles Higher Ed IT



# Three Steps Toward Candidate-Centric Recruiting



Highlighting Your Value Proposition from Start to Finish

## 1 Multichannel Candidate Outreach



**External Sourcing**



**Employee Referrals**



**Person of Interest  
Logbook**

## 2 Digital Employer Brand Presence



**Candidate-Focused  
Job Descriptions**



**"Get to Know Us" Job Sites**

## 3 In-Person Campus Matchmaking



**Candidate-Specific Visit Guide**



**Message-Conscious Interviews**



# Preview of Upcoming Research on Your Behalf

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# Project Prioritization Frameworks That Work

## Arriving at Fair, Value-Driven Project Decisions That Stick

Demand for new projects often exceeds available resources, but many institutions lack a consistent, transparent, and politically effective way to prioritize requests. Prioritization rubrics and scorecards can be helpful, but must be used within processes that discourage gaming and end-runs. Tactics to optimize project prioritization must be fitted to institutional culture and strategic need.



"There are way more ideas than resources. We are looking for resources that assist in prioritizing what projects need to get done and add the most value to the organization be it cost benefit, scoring rubrics, or resource planning tool. We are trying to develop a prioritization system that optimizes our project work."

Project Management Office Director  
*Public Research Institution*

## Potential Questions

- *What project attributes should rubrics or other assessment tools capture in order to fairly compare projects?*
- *How should different institutional interests be weighted or represented in project scoring and selection processes?*
- *What roles should IT, the PMO, and institutional governance play in project prioritization?*
- *What practices can discourage evasion or overriding of prioritization decisions?*

## Methodology and Deliverables

- Best practice interviews
- Profiles of advanced institutions' thinking about how to evaluate and prioritize project requests
- Collection of project evaluation rubrics
- Ideas for making project decisions transparent and "tamper-proof"

# Our (Limited) Asks Moving Forward

## Three Optional Ways to Inform Our Research



### Send Us an Email

- Email your experiences making decisions about project prioritization
- What were the key turning points or lessons learned?
- What information or insights drove your choice of processes?



### Participate in Research Interviews

- Please reach out if you have thoughts or practices you want to share in greater depth
- We may also reach out to you proactively

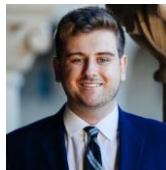


### Share Ideas & Artifacts

- Look for our survey link!
- Send us your:
  - Rubrics/scorecards
  - Processes
  - Worksheets
  - Policies
  - Presentations
- We will respect your confidentiality



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