

MJ MAJADLY

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Best Practices in Project and
Program Management

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Introduction

I work at the University of Nevada, Reno (UNR) as a teaching assistant within the college of business. I decided to conduct my interviews with university employees as it makes communication better and if I needed more info they will be easier to reach out to. I interviewed three administrative staff for this report, the main two employees I met in person, the third one was via email because she told me her responses will be short and may not help me within the project.

The program manager was Burcak who works for the Office of Information Technology (OIT). His official title is project manager, but he does a lot more. He is managing his own enterprise project level (it should be called a project because it has many side projects under it), he has 3 more project plus one more coming; all campus wide initiatives that he is managing. He was recruited to be part of the enterprise project level and after a year he was hired as a project manager.

- Program Manager:
 - o Name: Erenoglu, Burcak
 - o Title: OIT Project Manager
 - o Department: VP Information Technology
 - o Phone: (775) 682-5603
 - o Email: berenoglu@unr.edu

The project manager was Brian who works for the VP Administration and Finance. He was hired because the university implemented an ERP system which cover human resources, finance, grants, projects (capitalized projects in the finance world), it was not only UNR that implemented this, it was all Nevada System of Higher Education institutes. He was hired to work cross-functional group on campus from finance, HR, budget, all of those group and work with them on managing how the product changes and also looking for other opportunities now that they have implemented to add other products on top of that and manage those within finance. Brian is your more relaxed project manager, when it comes to his projects, he said “I have been lucky with the projects I have as I can keep “cooking” them until they are done and ready”

- Project Manager:
 - o Name: Meyerpeter, Brian
 - o Title: Project Manager, Enterprise Resource System

- Department: Business and Finance
- Unit Name: VP Administration and Finance
- Phone: (775) 682-6120
- Email: bmeyerpeter@unr.edu

I also got simple responses from a new project manager Erika that told me the position was created new for her, and that they are leaning things as they go along. I included some of her responses to show what things look like from a new project manager point of view.

She is in a transitional phase from project manager for the University Transportation Center (UTC), which was one large grant awarded to the university and it funded 40 projects to project manager for the college of engineering, in which she expects to oversee multiple grants.

- New Project Manager

- Name: Hutton, Erika
- Title: Project Manager, Engineering
- Department: Dean College of Engineering
- Unit Name: College of Engineering
- Phone: (775) 784-6529
- Email: ehutton@unr.edu

Burcak had the most detailed answers due to his experience and the fact that he is PMP certified and trying to apply some of the knowledge to his work at the university.

Project software tools utilized

Burcak

TeamDynamix is the main application that he prefers to use. He purchased the application when he transitioned positions to an official project manager within OIT. Within TeamDynamix he can see the active project portfolio, public projects, completed project, and more. They also have the ability to see the projects in more details, which ones are active projects, in process, on hold, cancelled, completed, met expectations, etc., and they can classify the projects as large projects, medium projects, or small projects.

Other project managers that he works with use other tools .Some use Jira, Confluence, Jester, and MS Office Tools. But they don't have an official project management tool that is enforced in OIT or campus-wide.

TeamDynamix also comes with IT service management tool for help desk as well as a Project Portfolio Management tool (PPM). Burcak Implemented the PPM section for people to be able to update their projects for the portfolio management perspective.

“We prefer everyone to use this tool, it has won a lot of awards in the higher education field, but it requires more than the tool itself investment” Burcak said. They also need to change some methodologies, for example, when you managing a project, if everyone who is working on the project can enter their time into this tool, then you can see everybody’s availabilities for certain tasks. Let’s say you have a task that takes 4 hours to finish, you can look at John Doe’s schedule, see his availability, and you can assign the task to him and see when he will be done based on what he provided in his schedule. If Doe doesn’t provide his schedule and they assign him this task, they will not be able to figure out when he will be done as they can’t tell what his workload is because he doesn’t work for him, and won’t know until Doe tells him.

Not only that, TeamDynamix also allows you to do Budget management. You can track every expense on this tool and if you don’t budget and expenses everything your project may not reach completion. The more data you provide, the more useful this tool is. This has to be an organizational wide, everyone who is working on projects needs to provide this data.

Brian

Brian takes advantage of MS Excel, MS Project, and Google. For collaboration purposes he said definitely Google is the top one, he calls google project management software because it really is to him, you have to communicate, and it’s all about communication. Google lets you talk to anybody anywhere and invite them to your group, documents, and more.

UNR uses Office 365 which he absolutely dislikes. It is implemented in a way that you need to use online word to edit the word document that you are collaborating on, and if someone does not have a license for Office 365, they have to purchase it. Whereas, in Google Sheets there is no license required.

For online meetings he uses GoToMeeting. They use “CampaignManager” for communication that handles mailing lists within LISTSERV software. There is a unr.list.edu that is built for communications list (this is an example for such lists from the Office of International Students and Scholars when I used to work with them <https://lists.unr.edu/sympa/info/intlsclr>), so

you can add whoever is on the team/project and email them at once. This way you don't worry about forgetting anyone or losing contact information.

Takeaways

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Project methodologies deployed

Burcak

Hybrid methodologies – waterfall and agile. Agile includes scrum. Six sigma will not be useful within the educational environment as it is more for production. If you want to be successful, you need to be flexible with the methodologies used, you can't only stick to one methodology. If you only use one, this will be a recipe for disaster. Then I asked Burcak what if PMO forces you to use certain methodology? He said "if it was forced by a PMO to use a certain methodology, but I know as a project manager that it is not the right one, I will challenge that decision"

Brian

Brian prefers waterfall but he does not use it especially coming from software development background. He likes more iterative work, which is like iteration within Agile. "Agile is the latest buzz, I think it has some communication benefits to it and there are some good tools that are built around it such as Jira" said Brian.

After watching Workday project process and handling he believes that with respect to this software in the first cut it was incomplete and looked like it was written by a bunch of students. He believed that Workday was an incomplete piece of software that after the first push they were going to use agile to eventually grow it out and keep adding stuff on a two-week basis. When he used to build software at the point where it needed to be released there was a lot of stuff in it that were tested; his main focus was product quality. Within the university, especially campus-wide projects or NSHE-wide projects like Workday, he sees that they get a lot of non-product quality projects out.

In the public sector when you work in a place like a university that works under the government ("the government is the most inefficient way to do things" he said) a lot of people place a lot of things on the government especially when it comes to elections. They believe that the government should do this and that as they can afford it but the fact is that the government

doesn't have enough funding to do things the right way because the way the government works is fair and they approach their projects as "complete as much as possible".

Takeaways

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Project Selection Process

Burcak

With TeamDynamix, they have projects in-take process. This process takes to types of requests:

- 1) Internal OIT project requests (available only to IT members)
 - Most on internal project requests are already funded.
 - They are required to enter a request (it's kind of a formality in a way because it is already been approved and funded)

- 2) Campus wide OIT project requests (available to all campus)

As soon as the request comes in, he starts looking at the project requirements. About 50% of the requests end up being help desk requests and not projects. The other 50% are projects that need help from OIT, such projects are requests from departments about making a software they purchased a single sign-on. He then approves it and sends it. One he sends it, he informs all the directors of the workflow that a project request came in and starting, and getting that into the system.

If the project needs funding or if it wasn't in the scope of the end project, he evaluates these requests as they come in. Afterwards, he talks to the deputy Chief Information Officer (CIO) and CIO to figure out what resources are needed, gather any related information, and then he transforms that information to upper management to see if this project or change can be funded or not.

Previously (before Burcak was hired) there was no solid project in-take process; they used SharePoint. I asked about changes to project baseline, and he told me that nothing happened before as these approaches he is taking are new to the university. Hopefully with the success of

his efforts, the rest of the university will be more willing to use his tools and directions in their projects and make everything more formal.

Brian

They are so far behind on what they should be doing for automation at the university. They just prioritize projects in their selection, mostly is what staff (resources) they have available at the time. It does not matter if the project is funded or not, it is more based on the organizational need. There is no governance on the projects they take.

When he gets a new project, he starts doing research, find out who's who, who is sponsoring it, develop the email list, start communicating with them, have more meetings, obtain domain knowledge, work on a schedule, build the work breakdown structure, collaborate with each stakeholder, and more. After that, if he sees that there is no interest in the project or it has no value to the organization he goes with a different one.

Takeaways

I have seen that their number one focus is to make student and staff lives easier and to be more efficient, and have to connect every work to a purpose. If you do not connect it to a purpose, employees will not be willing or excited to do the work

Key project management templates used

Burcak

The templates/documentations that are used within OIT are about 20% of typical project management documentation, the list can be really long, but they decided kept it light. Most templates were implemented by Burcak and his predecessor. These are more of a guidance and not enforced. They prefer people to use them, but since he has no one working for him, he can't force the use of these template.

The project management simple lifecycle structure includes four phases, and they can be applied to all projects. You start and plan the project, organize and prepare, carry out the work, and close the project. The Project Management Institute (PMI) originally defined the lifecycle in five phases, Initiation, Planning, Executing, Monitor & Controlling, and Closing. In order to simplify the process, they are covering the lifecycle in four phases. Each phase activities are given below and those steps are customized for UNR usage¹.

Here are the template OIT offers:

- Initiation: Project Charter, Meeting Minutes, Stakeholder Register
- Planning: High-Level Project Plan, Communication Plan, Work Breakdown Structure (WBS) / (WBS Cheat Sheet), Risk Register, Requirements Traceability Matrix
- Execution: Project Status Report, Change request, Issue & Risk Log, Change Control Log
- Closing: Project Closure, Project Sign Off, Lessons Learned

Project Management Lifecycle¹:

1. Initiation:

- Submit your project request
- Assign a PM
- Conduct Kickoff Meeting
- Define Team Roles and Responsibilities
- Sponsors Approval to proceed
- Enter project into TeamDynamix

2. Planning:

- Gather Requirements and define Scope
- Create High-Level Project Plan
- Finalize Communication Plan
- Develop strategies to manage risks
- Finalize Project Plan with the Team

3. Execution:

- Hold team status meetings
- Create status Reports
- Manage Issues and Risks
- Manage Quality of Deliverables
- Update your project status in TeamDynamix

4. Closure:

- Confirm requirements and deliverables have been completed.
- Hold Project Close Out Meeting
- Complete Project Closing report
- Update TeamDynamix and archive project folder

Brian

The defining moment for him is when he builds the work breakdown structure, get in project plan using MS Project, and lay it out. At that point he pretty well feels he got control of the project. He can tell people when it's due, he can build in what he needs to built-in to make sure they are okay, and then he runs around and communicate that plan to everyone on the project to see if this work can be accomplished with their workload. If all is good to go, he starts doing scheduling, etc.

Risk register – usually he learns what needs to be done and manages risk that way. As soon as he figures out everything that needs to be done on the project, he reaches out to the people involved. After hearing back from the people that they can do the work and there is no problem doing this, he gives it the okay. But he can't figure out what the risk is without seeing the whole process of the project.

In one case, he was communicating with the project sponsors about what needs to be done, and what risks involved in the project. The sponsor took the word risk, went back to his office, and started looking online about risks in a project. This sponsor found a risk register form and gave it to Brian and said fill this out. It troubled him since this person was an associate VP, and he asked to do something like that because a risk register is more than a list to him. Brian had to put every single line as a risk and he told the sponsor that “we haven't gotten to anything yet, we haven't met with the people involved, we haven't even defined the success criteria and to him it was all risk.” Brian considers everything a risk until he understands it. He believes that risk goes against success, and without identifying what the success is, he wasn't able to provide an accurate risk analysis

I asked him if he identifies risk items. He said “Not yet. Risk would make more sense if I had to meet a date and there was a financial consequence for not meeting that date. Then you have risk.” If it's something like they need to work the software until it's completed and it's ready, then he doesn't worry about the risks involved. He manages risk upfront by using his domain knowledge of experience to see that there are not any discrepancies between what the vendor is selling and what their expectations are.

He believes that a project manager is amplified by having really good domain knowledge of what they are working on. In university settings you can hurt a lot of people's feeling and make enemies if you don't manage change process very well and communicate it very well

Takeaways

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Project Management support/training programs

This topic and the next one are short because UNR has no idea how to do project management based on what I heard. Burcak said that "OIT is project management lite, it's hard to enforce a full project management methodology without having a PMO."

Burcak

He had no training when he got hired at UNR, he started building his own communications with stakeholders. He was hired as a Letter of Appointment to work on a multimillion-dollar project, and along the way, the OIT project manager position got created, and he was recruited for it.

In terms of teaching the use of the applications: UNR paid for two TeamDynamix specialists to come to UNR to give two sessions. One session was for projects managers and the other was for the team members. They had half a day training, documentations are available, as well as recordings of these sessions for people to come back to them whenever needed.

If anyone has a question about TeamDynamix, they can communicate with Burcak directly. If it is something he is unable to figure out, he will reach out to TeamDynamix for answers. This product was purchased two years ago, it took him about half a year with one hour phone call at least on weekly bases with the TeamDynamix team to bring the software to the implementation level it's at now.

Brian

Same as Burcak, Brian said he had no official project management training, he does not think the people at UNR (or HR) know what that training is. The software that his team uses are easy to use such as Microsoft Office Suite and Google; nothing too complex that needs to train employee's people on. He told me that he is very interested in using TeamDynamix, when it was first purchased he tried to access it but had no luck in doing so. I believe that was due to the 6

month Burcak spent on implementing the software for UNR needs. Brian will reach out to Burcak to see if he can get access and learn more about the use of the software to take advantage of it.

If he gets educated within the PMP certificate he will apply the things he learns. But he believes that if he was a certified project manager, he will not follow all the PMBOK standards as many of those standards may not work within the university, it all depends on the company's culture.

Takeaways

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Project Management Certifications

Burcak

Burcak is the only PMP certified employee in the whole OIT department and campus wide as far as he knows. Everyone he has met at the university do not have any certification. I believe this is the reason for the lack of project management support on campus. Burcak has only the PMP certificate. He got it in 2014 before moving to the U.S. from Turkey as he realized it is a valuable certification and will make it easier for him to get jobs; he wanted to be officially recognized as project manager. He went to PMI institute for in-class training for 35 hours. He also looked at the PMBOK book, and mostly focused on the Rita Mulcahy's PMP prep book which he believed to be the best resource to be used for the exam. While working full-time back in Turkey, he studied for about a month for 4-5 hours every day, usually from 7pm-midnight. He was able to pass the exam from the first try.

Brian

Brian does not have any certifications of any sort. As far as he knows, Burcak is the only PMP certified employee on campus. He does not think that you need to have a certification to be a good project manager. However, he really believes and wants to get certified for the reason that he attended the PMI Nevada chapter group meetings/dinners, and he noticed that having the PMP certificate adds to your toolset immensely. It will help you deal with many things from managing meeting and people to the right way of approaching communication, and believes that the certification would be pretty useful for that.

Takeaways

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Project Management Office (PMO)

Burcak

UNR has no project management office. Burcak's job is more related to that. He does a lot of the project manager and PMO duties, but he is the only one doing that. You can't call it a PMO with only one person, it just doesn't make sense because one person can only do so much.

If we take a look at the OIT website, it has a section about the PMO that says the following²:

The University of Nevada PMO aims to deliver excellent services to enable faculty and staff to effectively manage their projects. In support of this objective, the PMO provides:

- Project Management Methodology based on Project Management Institute (PMI) standards.
- Uses a best-fit, adaptable and flexible approach for Project Management
- Project Management mentoring and guidance for best practices and actual project issues and strategies.
- Project Management Templates and tools to have a repeatable process and structure.

PMO is always available to answer your questions about project management methodology and help you with your project management needs.

When you click on the contact information of the PMO, it takes you back to Burcak. He is doing most of the high level implementations and management as of now, and if they end up creating a PMO for the university, I believe he will be in charge of it given his experience so far.

He is a strong believer that UNR needs a PMO. If he was the decision maker on this he would collect all the project managers and put them under one roof. Have a PMO with a lot of project managers and give project management service to whoever needs it. He would have specialized project managers for facilities, IT, etc. and they can charge the departments back to use these services and that how they can fund it.

Brian

In the project of Workday they had a "PMO" that was a program manager and two project managers under him, and he does not know what happened to them after the project went

live. He does not recall working in a place that had a PMO, he was an entrepreneur for most of his career, and his only experience with a PMO was with Workday that was not pleasant. So, he is not sure if having a PMO would be helpful given his experience.

Takeaways

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Organizational Structure

Burcak

Matrix. Weak Matrix with a mix of functional within OIT (he is only talking about the OIT structure, he does not know what UNR structure is). He does not like these structures. He believes that Projectized would be the most efficient. That said, he doesn't see that happening at UNR. Strong Matrix organization would be ideal management here. But that requires a lot of more resources and investments like creating a PMO.

Brian

Brian said that when it comes to UNR, he really does not know what the structure; very distributed he said (That the only info he could give me). Again, he experience does not help as it was mostly him and less than 10 employees building software here and there, so it was not a big organization that they had to create a structure for it.

Takeaways

I have chos

Summary

I have chosen a case

References

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2. About PMO. (n.d.). Retrieved from <https://oit.unr.edu/projects/about-pmo/>

