



TEXAS TECH UNIVERSITY SYSTEM



Implementing Project Management

Rachel McDuff

Project Manager, Texas Tech University System

May 25, 2022



Topic:

- The process that TTUS Information Systems department has undertaken to build and implement a more holistic, department-wide approach to project management in accordance with TAC 216

Background:

- Historically, each of the development teams had their own project management processes,
- Changes in technology and growing business needs necessitated a change in methodology.
- A dedicated Project Manager role was added in the department to facilitate this shift.



Goals for Project Management:

- To create a repeatable and standardized project life cycle.
- To streamline processes to improve efficiency.
- To shift uncertainty to the early project phases to reduce risk in the development phase.



Areas of Focus:

- Building an operating policy
- Project initiation
- Discovery phase
- Design handoff
- Project tracking and reporting
- Software tools
- Future processes



Before building anything new:

- Thorough examination of the existing project management processes
- Identify best practices and pain points
- Bring about sustainable change by giving structure to familiar processes.



Definition:

- A living document that will be continually updated as project management processes are built and refined.
- “In compliance with TAC 216 TTUS Information Systems has formalized the Project Management Operating Policy (PMOP) to ensure the effective governance of IT projects at TTUS. The main objective is to maintain oversight and accountability of projects in order to better meet the needs and goals of our stakeholders. The PMOP is the road map for processes, communication guidelines, and expectations throughout the course of a project. Adherence to these guidelines helps to ensure a positive and timely outcome for a project.”



Contents:

- Defined roles and expectations for stakeholders and internal staff
- Communication expectations
- Project phases outline
- Change management policy
- *Additional processes are added as they are created.*



Example of Stakeholder Role:

Active Roles: Depending on the project and or/department a single person could fill both the Decision Maker and SME role.

- Department Advocate – This person should be chosen based on their knowledge and experience with the application or process being worked on. They should understand the both the functionality of the application and the business implications. This person should have the support and trust of their Executive to be able to make necessary design decisions and provide input on process changes.
 - Expectations:
 - Act as their department’s main point of contact for TTUS IS teams
 - Will be included most project communications
 - Prioritize attendance to all project meetings they are requested to attend. This will include, kick off meetings, discovery sessions specific to the Decision Maker role, review/gate meetings, design meetings, and development updates. If unable to attend, ensure representation is present
 - Participate in and provide input during all phases in the project life cycle.
 - Complete action items by their assigned due dates.
 - Communicate with Executive stakeholder (defined below) regarding the project as needed.



Steps:

- Project request received through CIO, Director, or Jira request form
- Projects are prioritized
- Project Manager creates the project charter

Project Initiation



1. SUMMARY	
Project Name	
Project Start – End Dates	
Project Purpose	
Approved Date	
Approving Body	

2. Client (Background)
<ul style="list-style-type: none"> • What are you using? • How did it come to be? • What is the current process? • Is it a manual process? • Who is the end user?

3. Project
<ul style="list-style-type: none"> • Why are we doing this? • What's wrong with the existing process or application?

4. Scope
<ul style="list-style-type: none"> • What are we doing? • What do we need to do to fix it? • What the project is intended to accomplish (Goals) • What the project is not intended to accomplish

5. MILESTONES & DELIVERABLES			
Deliverables (Quantify – be specific)	Main Tasks	Start	End

6. POTENTIAL ISSUES & RISKS			
Issue / Risk	Description	Probability (H, M, L)	Impact (H, M, L)

7. Stakeholder Listing		
Name	Institution	Area

8. Expectations
<ul style="list-style-type: none"> • Software development projects entail considerable effort including technical and functional investment. Undertaking such an investment is agreed upon by all participants after careful consideration of resources, effort required, business schedules, and time to complete the requested project. Agreeing to commence the project sets expectations from technical and functional participants to adhere a timeline based upon a realistic project timeline. The project must be adequately defined to allow for a sensible project timeline and take into consideration any business schedules that may impact project work. All project participants (technical and functional) agree to following: <ul style="list-style-type: none"> ○ Adhere to the project timeline ○ Assist in building and statusing the project timeline. ○ Complete all project assignments ○ Project assignments include technical work assigned to technical staff. ○ Defining business processes impacting the project ○ Testing software developed during the project ○ Participate in project meetings ○ Engage in meetings ○ Provide feedback for any question asked. • Additionally, technical participants will utilize project management tools including but not limited to: <ul style="list-style-type: none"> ○ Monthly Executive Summary reporting to executive stakeholders ○ Risk Register maintenance ○ Change management ○ Other ad hoc project reporting



Steps:

- Project charter approved by Director
- Applicable business processes are identified and defined.
- BPA plan is created by Project Manager
- Business processes are defined and sequenced



Part of Term BPA Sessions

1. Withdrawals
 - a. Description of Category: The process of withdrawing a student from the university and the implications of Part of Term depending on term and withdrawal date on SBS and FA for student funding.
 - b. Touchpoints:
 - i. Registrar
 1. TTU
 2. HSC
 3. ELP
 4. Law
 - ii. Student Business Services
 1. TTU
 2. HSC
 3. ELP
 - iii. Student Financial Aid
 1. TTU
 2. HSC
 3. ELP



Steps:

- Business processes are defined and sequenced
- Stakeholders are identified for each BPA session
- Director identifies oversight committee sends the project charter and BPA plan for approval
- Kickoff meeting occurs with internal staff and project stakeholders for final agreement on project charter and BPA plan



Steps:

- BPA sessions are conducted for each identified process.
- BPA documentation is created for each process as well as summary documentation when needed.
- Stakeholders review and provide feedback for BPA documentation.

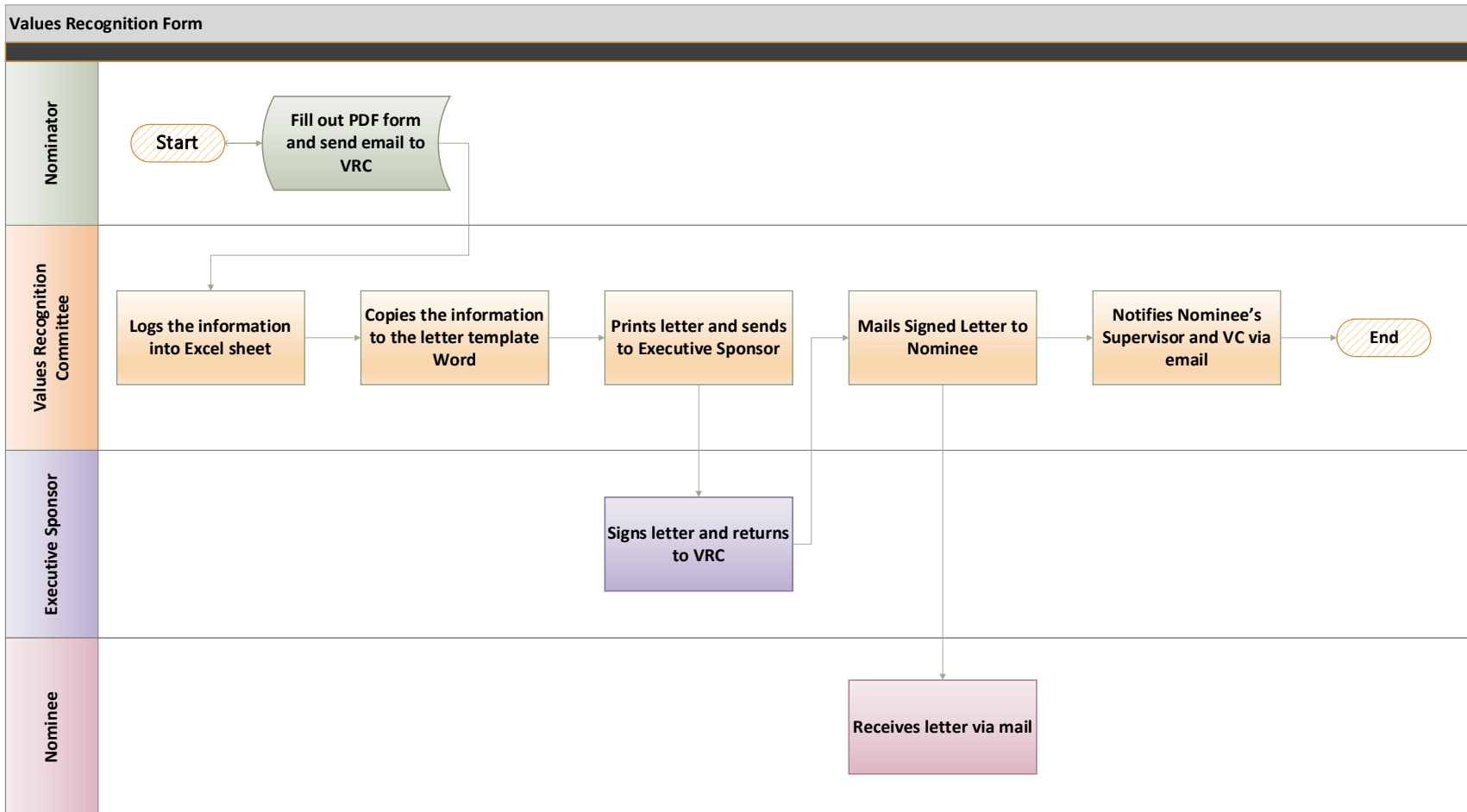
Discovery Phase



Process Name:	Values Recognition Nomination Form		
Interview Date:	Tuesday, February 15, 2022		
Institution:	Texas Tech University System Administration		
Attendees:	Name	Title	Department
	Dale Ganus	Associate Managing Director	Information Systems
	Rachel McDuff	Project Manager	Information Systems
	BA 2	Business Analyst	Information Systems
	Lavanya Palle	Business Analyst	Information Systems
	Customer 1		
	Customer 2		
	Customer 3		
Facilitator:	Rachel McDuff		
Recorder:	Dale Ganus		
Contact Person:	Customer 2		
Contact Phone:	806-834-****		
Business Objective:	To create, process, and distribute a Values Hero nomination.		
Special Terms:	• None		
Process Begins:	The Nominator fills out the nomination form		
Process Ends:	The Nominee receives the Values Hero letter.		
Inputs:	<ul style="list-style-type: none"> • Nominator Name • Nominator email • Nominee name 		

	<ul style="list-style-type: none"> • Nominee R number • Nominee email address • Nominee department • Nominee supervisor • Supervisor email address • Nominee Vice Chancellor • Vice Chancellor email address • Value being recognized for • Text for nomination
Outputs:	<ul style="list-style-type: none"> • Values Hero Letter • Supervisor, VC, and Nominator notifications • Other Awards • Reporting
Process Customer:	Nominator and Nominee
Process Actors:	<ul style="list-style-type: none"> • Nominator • Values Culture Executive Sponsor • Recognition Committee • Nominee Supervisor • Nominee Vice Chancellor • HR
Process Owner:	<ul style="list-style-type: none"> • Recognition Committee
Stakeholders:	<ul style="list-style-type: none"> • Chancellor • Values Ambassadors • System Employees
Metrics and Additional Relevant Information about the Process	
Transaction Cycle Time:	Best Case: 3 days
	Usual Case: 1 week
	Worst Case: 2 weeks
Calendar Data:	<ul style="list-style-type: none"> • Average of 15 per month, peak around large events or projects

Discovery Phase





Steps:

- Gate meeting for stakeholders to accept final BPA documentation and set expectations for design.
- Internal meeting to define staff roles and responsibilities during design, sequence the work, establish meeting cadence.



Project Tracking and Reporting

- Tracking was historically done in MS project, did not meet high level tracking and reporting needs

- Project Tracker
 - *Complete list of all projects for the department*
 - *Includes project phase, phase beginning and end dates, risks, assigned resource, summary of status*

- Executive Summary Report
 - *Summary status reports to executives for high visibility projects*

- “Pre-design” Tracker
 - *Detailed check list of pre-design tasks*
 - *Tracker for BPA sessions and deliverables by project*

Project Tracking and Reporting



Project Tracker

Area	Project	Phase	Phase Start Date	Phase End Date	Ahead, On, or Behind Schedule	Known Risks	Assigned	Update
HR/Payroll/ Budget	EOPS Rewrite	Design	5/17/2022	TBD			Rachel	Design handoff 5/17/22
	Pushing W2 Information to Equifax	On Hold	April 2022	TBD	On Hold		Debora	
	Leave Balance Detail Application	Development	3/17/2022	7/31/2022	On Schedule		Debora	Will be ready for users to review by end of May. No longer using DF.
	ibars rewrite	Development	6/15/2021	TBD	On Schedule		Debora	One for one re-write to bring into current technology. Will have estimate week of 4/25
	PY_ERS_Daily_Load Re-write	Development	2/4/2021	7/31/2022	On Schedule		Debora	Moving to UDEV for user testing.
	TTU HR Dashboard	Design	2/18/2022	6/30/2022	On Schedule		Debora	Meeting scheduled 3/31 to show mockup to users.
	Integration of Employee Data to Banner Advance	Review	TBD	3/17/2022	Complete		Debora	Columns added on employee file. Account and view created, information sent back.
	TTUS System Interface Services Needed for TTUHSC PM System	Testing	5/8/2020	TBD	On Hold		Debora	Testing on hold. Go live TBD



Executive Summary Report

Project Name:	Week Ending:		
Project Phase:	Project Manager:		
Description of Project Phase:			
Phase Start Date:	Phase End Date:		
This Project is...			
Ahead of Schedule	On Schedule	Behind Schedule	
Drivers Behind Schedule Variance:			
This Project is...			
Green when: The project proceeds as normal due to minimal identified risk	Yellow when: The project needs to be monitored due to moderate identified risk	Red when: The project needs immediate action due to significant identified risk	
Circle Project Health:	Green	Yellow	Red
Explanation:			
Work Completed:			
Next Steps:			
Project Risks:			

Project Tracking and Reporting



“Pre-Design” Tracker

	Create Project Charter	Review with Jeff	Create BPA Planning Doc	Send Charter and BPA list to approving body	Kickoff meeting with all stakeholders	Conduct BPAs	BPA doc review	Gate meeting	Design handoff
EOPS Rewrite	Y	Y	Y	Y	Y	Y	Y	Y	Y
ESMT	Y	Y	Y	Y	Y	Y	Y		
Part of Term	Y	Y	In-Progress	In-Progress					
USAS Upload	Y	Y							
Muppet	Y								
GGHSON Student Services Application	Y								
Overpayment Process									
Salary Planner/Position List									
New Clery Project									

Project	Process	Notes	Session Date	Notes and Recording Uploaded to Teams	Doc Completed	Flow Chart Completed	Recording Uploaded to Confluence	Doc Uploaded to Confluence	Approved by Stakeholders
ESMT	eCrt		1/14/2022	Y	Y	Y	Y	Y	
ESMT	ePAF		1/28/2022	Y	Y	Y	Y	Y	
ESMT	WTE/WLR		2/11/2022	Y	Y	Y	Y	Y	
ESMT	Student Security		2/18/2022	Y	Y	Y	Y	Y	
ESMT	Budget Prep		2/25/2022	Y	Y	Y	Y	Y	
ESMT	Financial Security		3/7/2022	Y	Y	Y	Y	Y	Y
ESMT	Student Athlete Security		3/10/2022	Y	Y	Y	Y	Y	
EOPS Rewrite	Post Employment Payment Processing		6/1/2022						



- Currently all reporting, tracking and documentation is managed in MS Office applications such as Teams, Excel, and Word.
 - *Our processes have far outgrown these tools.*

- Searching for an all-encompassing project management tool that will enable continual maturation and expansion of pm processes
 - *Engaging in demos and discovery with ServiceNow*



There are processes we will continue to expand upon as part of our project management journey with the assistance of project management software:

- Improved project requesting and prioritization processes
- Enhanced change management policy
- Risk management
- Standardization of the development phase
- Refinement of estimation and resourcing



Q&A

If you have additional questions after today or would like to see our full templates, please feel free to email me at Rachel.McDuff@ttu.edu



TEXAS TECH UNIVERSITY SYSTEM™