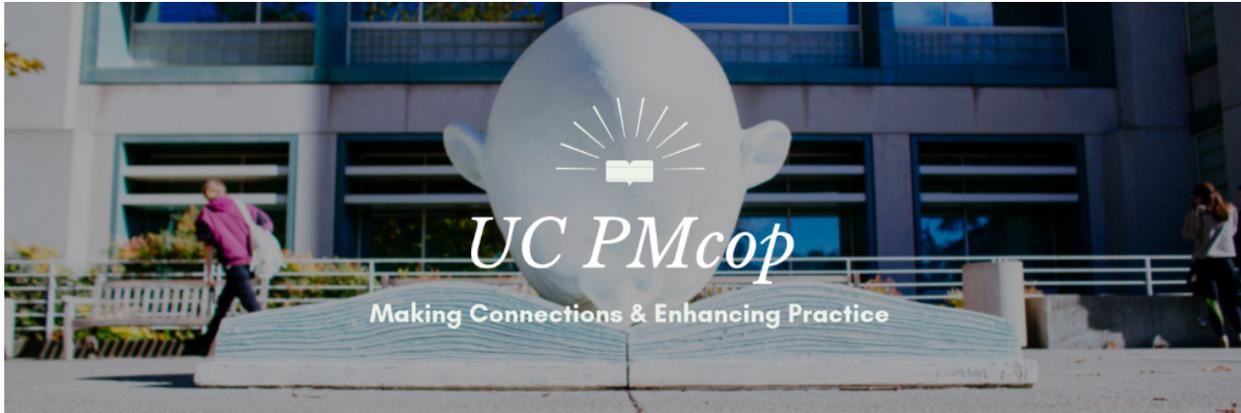


# UC IT Project Management Community of Practice (PMcop) Larry L. Sautter 2019 Award Proposal



## Submitters on Behalf of the UC IT Project Management Community

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## UC IT Project Management Community Leaders, FY2018-2019

- Niquole Dunham, Director of Internal Systems, UCSD Health
- Constance Fuller, Project Manager, UCD
- Zach Herman, Program Manager, UCSD Health
- Katie Mankins, Director of Special Projects, UCSB
- Stephanie Nielsen, Administrative Business Systems Manager, UCSC
- Halina Wojnicz, IT PMO Director, UCOP

## PROJECT SUMMARY

### Challenge

In 2017, in response to a California State Audit, the University of California agreed to strengthen and improve IT project management. The audit recommended adopting best practices related to scheduling, integrated plan management, and project risk management. Most urgent, it identified the need to codify requirements and guidelines for project reporting and communicate the new guidelines across a decentralized system with diverse organizational structures.

### Solutions

To address the audit's findings, a new document titled "The Regents Reporting Policy and IT Project Management Guidelines" was created, and subsequently a one-day symposium was held. It provided IT individuals from across the UC system the opportunity—as a team—to participate in Q&A sessions on the new regulations. During the day's other activities, IT project managers met and interacted with peers, thus forming a system-wide community

to share best practices and collateral; leverage tools, ideas, and templates; innovate and implement new ideas and exchange experiences and lessons learned.

To continue and expand the dialog started at the symposium, an IT project management birds of a feather discussion session was held at the 2018 UC Computing Services Conference (UCCSC, now UC Tech); the thirty attendees expressed a strong interest in continuing to collaborate on common problems and areas of interest; they committed to monthly meetings by Zoom, to developing priorities for a group effort, to create a repository of project management resources to share, and to create a project management track for the 2019 UC Tech Conference.

## **Outcome**

This new level of on-going, frequent communication and collaboration among the systemwide IT project management community (PMcop) that started at the symposium has become an effective tool to discuss common problems and to develop project management skills. It is a community that will continue with its goals of connecting people, enabling dialogue, sharing and generating new knowledge, and providing support for IT managers in delivering successful projects. The launch and inaugural year of the PMcop has been an innovative approach to building project management bench strength across the UC system.

## **NARRATIVE**

### **Project Goal**

Cultivate an indispensable, self-supporting UC IT project management community of practice that connects people, enables dialogue, shares and generates new knowledge, and supports members to deliver successful projects.

### **Objectives**

#### **Launch on-going support and coordination**

At the 2018 UCCSC IT project management birds of a feather discussion, thirty attendees met, explored connections and brainstormed joint issues. Once it was determined that the group wanted to continue with monthly meetings, six volunteers from five UC locations agreed to provide support and coordination and lead the development of community activities.

Shortly after the conference, these coordinators established a fixed meeting time, titled the Third Thursday at Three, defined approaches to solicit input and participation from the members of the PMcop and reviewed collaboration tools that would work for members across the system.

PMcop members were invited to share their expertise at various participation levels from leading discussions, to presenting at meetings, answering surveys, voting on topics of interest, providing feedback, and recruiting others to become involved.

Early on the decision to incorporate technologies like Zoom for meetings, SharePoint for a knowledge repository, and Slack for communications empowered the PMcop members to interact. Beyond the meetings, Slack served as a neutral place to chat on urgent topics, asks questions, get expert advice, and share success informally. Individual

PMcop members introduced other technical tools to support activities they facilitated, such as Trello boards for brainstorming and voting, Google apps, Box, and Qualtrics.

### Deliver value to PMcop members by focusing on joint interests

Much of the value of the PMcop has been driven by regular contributions of the members who enthusiastically share their expertise and knowledge. A clear focus helped attract and interest people to contribute. This focus was the result of collaborative work by PMcop members who developed and facilitated the completion of a survey intended to capture the landscape of project and portfolio management across our participants' campuses. Furthermore, the monthly meeting participants actively voted on topics that were brainstormed at the 2018 UCCSC BOF. Combining the survey results and the topic votes, the community's focus was set to gather information from groups that have formal processes and documentation and to highlight Project Portfolios, Demand Management, and Budget and Estimation Techniques.

Monthly agendas were then setup to include a presentation on these topics. This year the presentation topics were "Project Management Maturity", "Project Management Tools and Templates", "Earning the PMP & Earning PDUs", "Portfolio Management", "Capacity Planning", "Deliverable Expectation Document (DED) and Procurement", "Implementing Agile using a Scrum Case Study". In the coming months, presentations will include a case study on Demand Management and Operational Readiness for Large Projects. The monthly meetings also included time for discussions on challenges and group announcements. Having a regular schedule of meetings has helped establish a rhythm for the community.

The PMcop has also recently formed a working group to focus on developing best practices for portfolio management. Members from various campus have presented their approaches to implement portfolio management and the tools they use to support the implementation. The group has thus far completed a survey and identified shared challenges.

### Create and promote a UC Tech project management track

A key goal for this year was to establish a new track at the UC Tech conference for project management. This opportunity was promoted throughout the year at the monthly meetings and on Slack. As a result of steady communications, the ability to vet topics on the monthly calls and to receive support and encouragement from the group, over thirty proposals were submitted to the conference. This was the second highest number of submissions! The UC Tech Conference also provides an opportunity for members to meet in-person at least once a year, and this year the community will host another pre-conference meetup.

## **BENEFITS FOR MEMBERS AND UC**

### **Innovation**

The PMcop's primary goals are to build relationships and encourage members to make contributions that help the entire group deliver successful projects across the system. The PMcop is an innovative approach to building project management bench strength across the system. It is anticipated the community will continue to build and improve systemwide learning opportunities, knowledge sharing, technology sharing, and project management leadership.

## **Inclusion**

PMcop members have expressed their appreciation for the opportunity to be brought together to discuss issues for project management. Project Managers across the UC system often feel as if they are working alone. They may be unaware of tools, techniques, or templates used at other institutions or even within their own university. They may be unaware of industry trends and best practices. The PMcop provides regular interactions with members via virtual and in-person meetings, and informal discussions via Slack. Regular communication promotes networking, sharing of experiences and success, and awareness of best practices. Members now make the time to help co-facilitate, share expertise, and offer technology solutions throughout the year.

## **Access to and Sharing of Expertise**

PMcop members represent various levels of project management skills from beginner to experts. Bringing the group together has helped discover previously unknown areas of expertise within the system, and this knowledge sharing not only reduces the learning curve for those getting started, but also helps prevent unnecessary “reinvention of the wheel.” Examples include sharing, rather than reinventing, project management templates, tools, and training classes. During one monthly meeting, training opportunities were discovered: Mike Roach, Director of Program Management at UCLA Health, currently offers a PMP certification bootcamp available at UCLA and he made this available to other campuses. This group is currently delivering a PMP Cohort to a consortium of three campuses (the combination of these three gave a full cohort). Three additional campuses who don't have enough participants for the bootcamp team to travel to have the option to join the next UCLA PMP cohort. He and his team are also engaged with three campuses to deliver Certified Agile Practitioner Certification Training, and they are actively deploying Clarity, branded U-Plan, to three campuses with a fourth in early planning stages.

## **Professional Development**

PMcop members can earn one PDU, Professional Development Unit; these units are necessary for maintaining Project Management Institute (PMI)-certified credentials and required for the Project Management Professional (PMP) certification.

## **TIMEFRAME**

The project began at the UC Computing Services Conference at UC Davis in August 2018 and the inaugural year will end at the UC Tech Conference at UC Santa Barbara in July 2019.

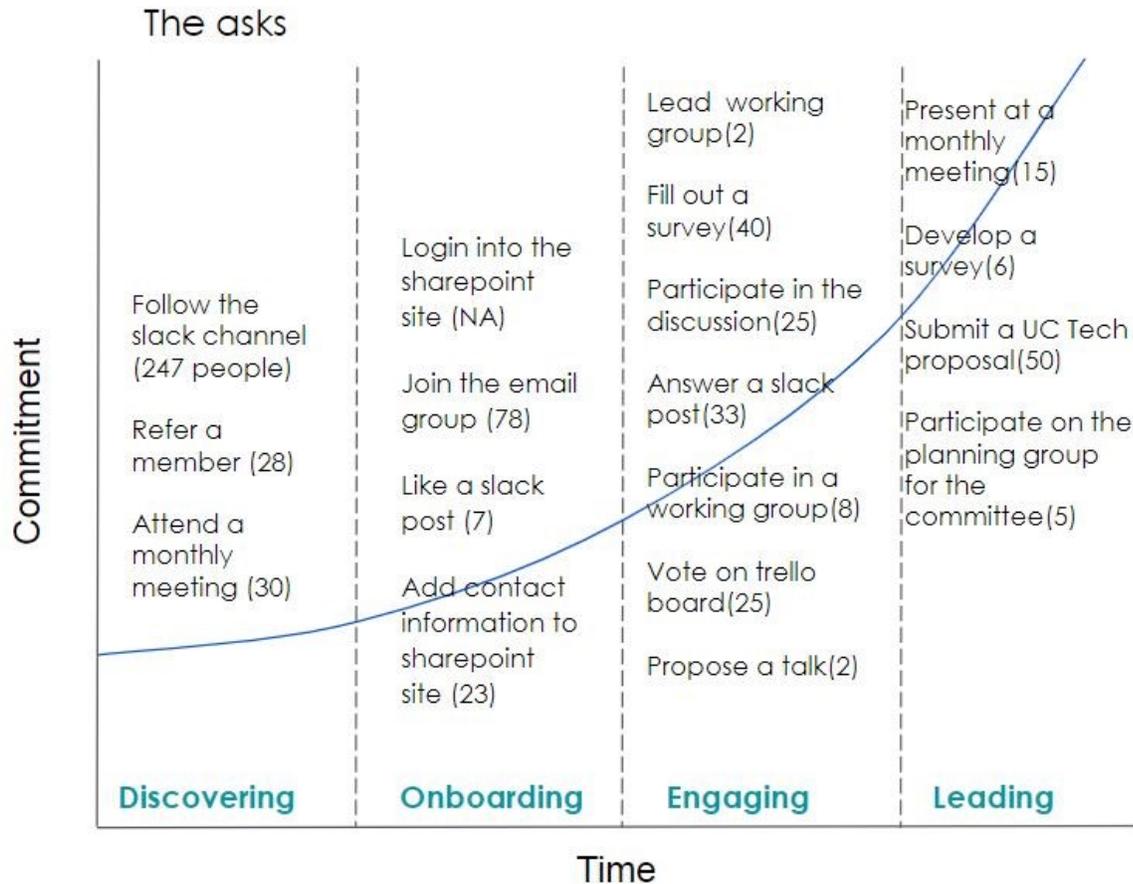
*Note: the accomplishments discussed in this proposal are complete as of May 3, 2019.*

## **MEASURING SUCCESS**

For fiscal year FY 2018-2019, the use of a community commitment curve helped to architect and measure the level of engagement over time. The more people invest, the more there is a sense of belonging and commitment to the community and that outcome is important to sustain a community that is aligned to the strategic goal of building bench strength of project management skills. Knowing where people are in the journey helps to understand the level of value being delivered to individual members, but, more importantly, it helps ensure alignment of the strategic goal of growing bench skill is maintained. The following chart illustrates the asks

mapped to different levels of a member’s journey in the community and the number of members who completed the ask.

Community Commitment Curve – FY 2018-2019



## SUMMARY OF ACCOMPLISHMENTS

The project has been a success both with the outcomes and with its impact on participants. Since the onset of the project, the PMcop group has achieved the following:

- Completed 9 monthly meetings with an average of 30 attendees
- Built an authenticated SharePoint site as a one-stop shop to find information about the group
- Submitted 30+ proposals to the inaugural Project Management Track at the UC Tech Conference; the volume of these proposals was the second highest number submitted!
- Increased Slack membership from 87 to over 240 members
- Created and reviewed the results of a survey illustrating the makeup of our group
- Started a Portfolio working group identified as a priority topic for the members
- Earned PDU credits for attendees at the monthly meeting
- Included active participation from almost all UC campuses, health centers and UCANR