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Gaining Momentum: Project Management and the PMO

Breakout Session

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SESSION DESCRIPTION

The Project Management Office launched a framework for tracking projects that includes four project categories, eight lifecycle phases, and new health designations, with a goal of ensuring that IT initiatives are appropriately scoped, governed, and aligned with institutional priorities. This session further explores this framework and discusses how to work with the PMO to manage and track projects.

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Project Categories

Project Type	Characteristics
Enterprise	• Significant enterprise-wide impact and a high level of risk • Involve several functional and technical areas • Sponsored by the CIO and at least one of the Executive VPs • Require significant project documentation • Approved by IT Governance Executive Committee • Example: ERP Modernization
Standard	• Medium level of departmental impact, scope, risks • Sponsored by DoIT CIO or CIO direct report • Approved by IT Governance Advisory Committee • Requires typical project documentation • Example: S/W upgrade or implementation with medium level of risk (such as new ServiceNow functionality available to the entire community)
Specialized	• Focused impact (one or two units) and low risk due to their straightforward or routine nature and limited dependencies • Effort primarily from one area within DoIT • Requires minimal project documentation • Shared with appropriate IT Governance Working Group • Examples: Pilot projects; Enhanced Endpoint Management for DoIT devices
Operational	• Projects that need to be tracked mostly for reporting or effort tracking purpose • Requires only periodic reporting of lifecycle status • Reported as a portfolio to appropriate IT Governance Working Group • Assigned PM reports to PMO on status and lifecycle phase • Examples: Routine software upgrades and patches to enterprise systems

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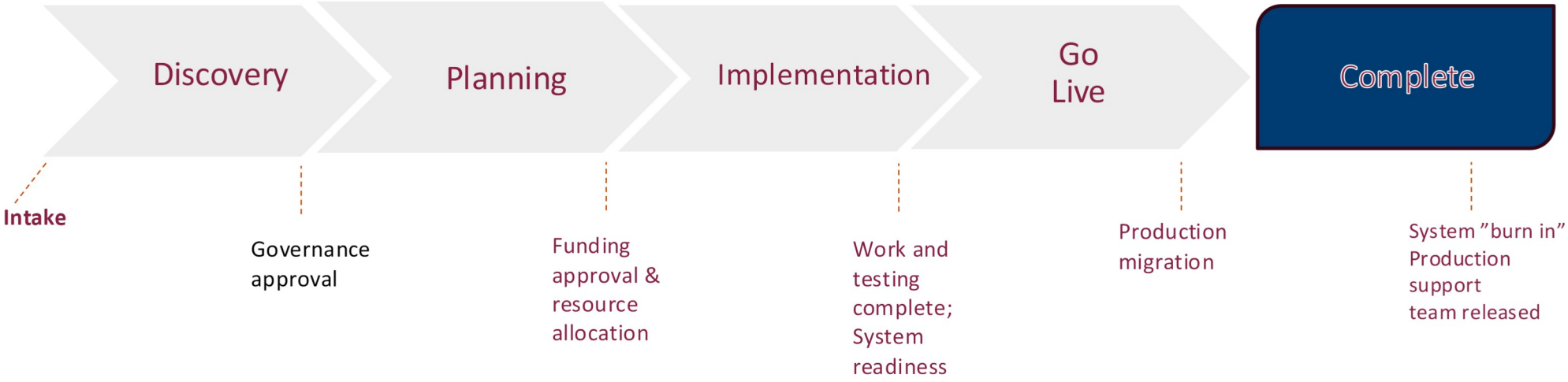
Project Lifecycles



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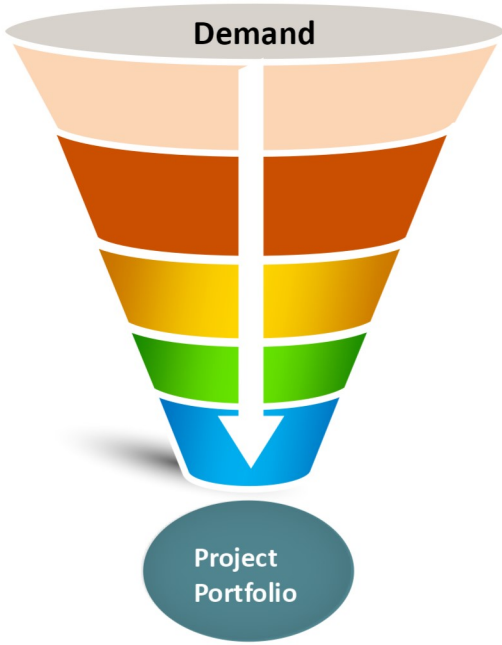
Canceled, pending funding, or pending resources are also phases.

Intake & Discovery

- All project requests begin by completing a project intake form
- Discovery includes a review with technical and functional subject matter experts to fully understand the nature and scope of the request
- Evaluate the current solution landscape to determine if there are opportunities to leverage existing offerings
- Project categorization identified (informing approvals)
- A project passes from discovery to planning with appropriate approvals
  - **Enterprise**: Approved by IT Governance Executive Committee; meet quarterly
  - **Standard**: Approved by IT Governance Advisory Committee; meet bi-monthly
  - **Specialized & Operational**: Shared with IT Governance working group



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A project may also move from this phase to **canceled, pending funding, or pending resources** based on the deliberations of the IT governance body.

Planning

The project manager develops the plan. Sample activities include:

- Functional, IT security, and user experience requirements
- Review of the current institutional solution landscape to determine if an existing solution will meet at least 80% of needs (all projects)
- Development of resource requirements (both functional and technical) along with a rough timeline
- Solution, business, and enterprise architecture documentation (including data integrations with other systems) and finalized charter
- Development of an RFP or request for quote for commercial software solutions
- IT security review of proposed solution
- Review of how proposed solutions meet user experience requirements
- Review of proposals and recommendations for selection
- Detailed budget (and request for funding if needed)
- Project schedule
- Begin work on understanding how the system will be supported once in production

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Funding & resources should be approved to move to the next phase.

Implementation

The plan becomes reality. The project team executes on the timeline, and project sponsors and project steering committees begin regular meetings. Activities include:

- Work on system implementation and/or configuration
- Validation of data integrations
- Development of specific testing plans around functionality and, where appropriate data and process migration
- Creation of training plans for both administrative and community users
- Develop communications plan, both in terms of project status as well as the type and timing of impacts to the community
- Continued validation of IT security and user experience assessment
- Define production support of the system

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Go Live

This is the phase where the project prepares for the changeover to the production environment. Key activities:

- IT PMO will coordinate to identify an appropriate go live date
- Change Management will be heavily engaged to assist in stakeholder readiness
- Finalizing the production support documentation

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Completed

The system is adopted and after a short period, project will be closed.

- The sponsor group and appropriate IT governance body will be informed of the completion of the project
- Project resources released to engage in other work
- Change Management activities such as tracking adoption and benefits realization metrics will continue for some duration

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Non-Active Phases

Cancelled

Not approved by the appropriate IT governance body and projects that are not funded within a reasonable time. Projects that do not demonstrate continual forward momentum may also be canceled at the discretion of the project sponsor, CIO, or the appropriate IT governance body.

Pending Funding

Projects approved by the appropriate IT governance body for which funding is not identified will be placed in this phase. The IT PMO will work with the project sponsors to identify who is responsible for submitting the project for funding as part of the institution's annual critical needs request (CNR) process. Projects may only remain in this phase for two funding cycles.

Pending Resources

When resource needs are identified that can't be met but required for project success. Projects placed in this phase should be reviewed regularly with the appropriate IT governance body (with regards to prioritization) and the appropriate DoIT unit (with regards to resource availability). Projects may only remain in this phase for 24 months.

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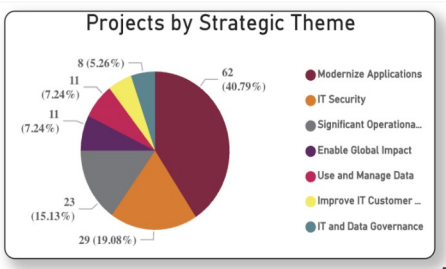
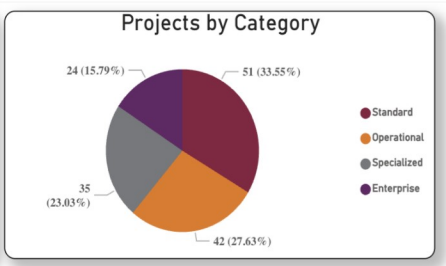
Project Health & Reporting

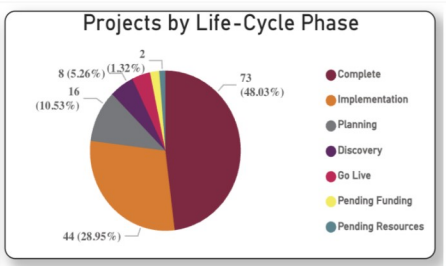
We are currently reporting

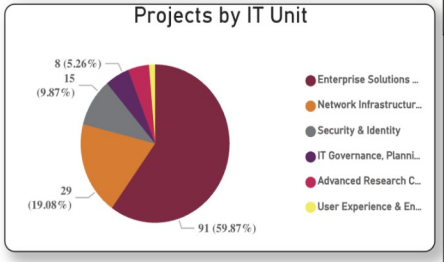
- **On track** - meeting internal milestones and is projecting to complete on-time and on-budget.
- **Close monitor** – missed milestone, trending late and/or over budget.
- **At risk** - missed numerous internal milestones, having scope challenges, missed deadlines.

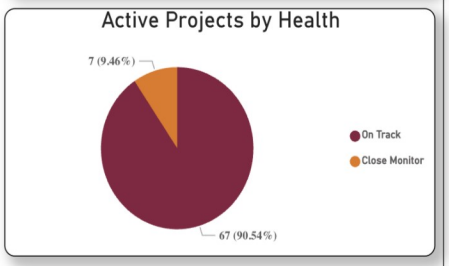
Development of monthly update process for health and phase statuses.











152 Information Technology Projects

Project Health	Project Name	Description
	Virginia Tech Academic Building One Network Infrastructure	As part of the construction of Academic Building One, managed all network instrastructure work, including new internet connectivity fo
On Track	CBRS private cellular proof of concept at Stroubles Creek	Collaboration with Commonwealth Cyber Iniative to install the infrastructure and services required to deploy an outdoor wireless researc Potential use cases for the private cellular network are connectivity for research telemetry, public safety communications, VT Facilities t
	AI as a service	The AI LLMs as a Service initiative delivered strategic value by reducing adoption barriers and operational complexity associated with g cost to researchers, the project cotinually ensures data privacy, lowers expenses, and accelerates innovation across disciplines, aligning d
	AI Productivity Assistant (Copilot) Pilot	Piloted Microsoft's Copilot AI to assess productivity gains through automation, focusing on user feedback, adoption, and daily efficiency
	High Performance Computing Cyber Infrastructure Strategy Update	Completed updates to the federally required cyber infrastructure strategy plan in support of federally funded high performance computin
	New 3D Visualization Resource	Installed a new 3D visualization resource named the Immersa deck. It expands the size, volume, and computational power of the former
	New High Performance Computing Systems	Deployed the Falcon GPU cluster comprising 52 high-performance nodes (208 NVIDIA A30 and L40s GPUs) to meet escalating campu infrastructure upgrade enhances computational throughput, supports diverse research workloads, external funding and research competit
On Track	GIS Archival Storage Project	This project will establish a centralized solution for archiving Geographic Information System (GIS) data, ensuring efficient long-term s data retrieval, and ensures compliance with data retention policies.
On Track	Evaluation of Video Content Management Systems	Assessing options for long-term video content management, comparing Kaltura with other providers to support academic media services
On Track	Long-Term Canvas Course Archiving	Copying courses from our main learning management system, Canvas, into an archival system for long term retention purposes.
On Track	Learning Management Marketplace Evaluation	This project will evaluate online learning platforms to determine the cost-effectiveness and continued value of LinkedIn Learning amid r
	Simplify and Streamline Telecommunications Business Model	Streamlined the provisioning of services for employees and departments to provide all employees with essential network and communic budget office, created a model for predictable annual charges for departments instead of thousands of individual financial transactions.
	VT Open WiFi	Launched VT Open WiFi campus-wide to simplify internet access for visitors and to support seamless, but limited, connectivity for IoT administrative overhead, and lowering support and operational costs.
On Track	Microsoft 365 and Copilot Training Initiative	This initiative provides university faculty, staff and students with new training opportunities on how to use M365 apps and services as w

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How the PMO Can Help

- Assigning PM to projects
- Guidance on engaging governance bodies
- Review discovery and charter deliverables
- General project management guidance and templates
- Consulting – scoping projects, PM practices
    - Contact the IT PMO at it-pmo@vt.edu

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