



# Transform IT Update

## UO Senate

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# What is Transform IT?



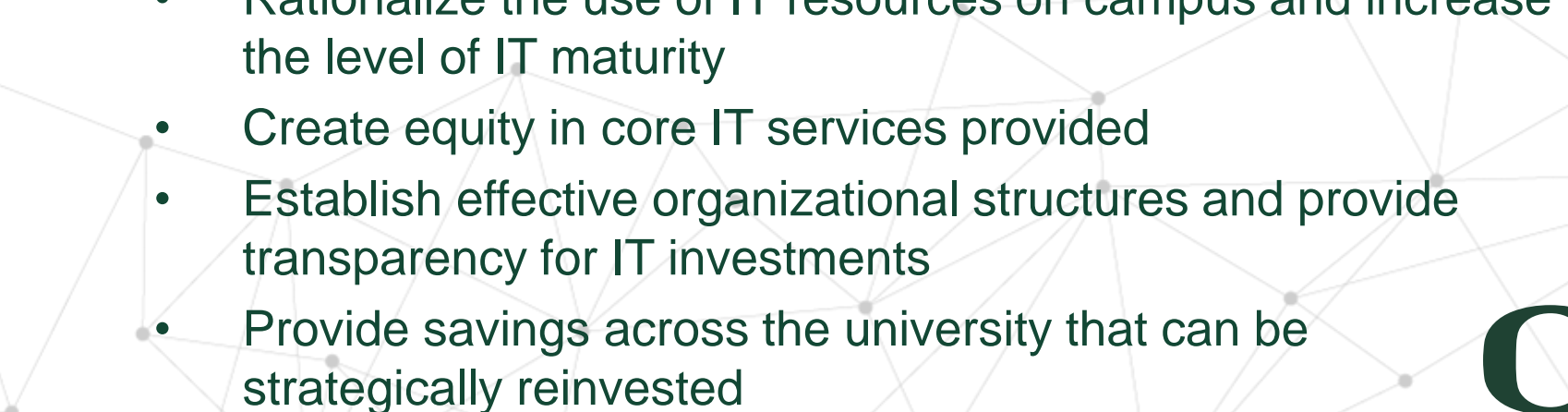
Transform IT is the University of Oregon's program that will rationalize the use of information technology resources on campus to better support the University of Oregon's strategic academic and research missions.

For more: <http://transformit.uoregon.edu>



# Why Transform IT?



- Currently 29+ unique IT departments on campus
    - Inefficient use of resources
    - Fragmentation of work
    - Duplication of tools, processes, and services
    - Disparity among levels of service received for academic, research, and administrative units
  - Transform IT will:
    - Rationalize the use of IT resources on campus and increase the level of IT maturity
    - Create equity in core IT services provided
    - Establish effective organizational structures and provide transparency for IT investments
    - Provide savings across the university that can be strategically reinvested
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# How will we accomplish this?



# Robust Project Management







The Project Management Institute (PMI) was established in the United States in 1969

- Not for profit for the purpose of advancing project management
- Has become a global organization with 500,000+ members in 185 countries
- Publishes *A Guide to the Project Management Body of Knowledge* (PMBOK Guide)
- Offers internationally recognized certifications, including Project Management Professional (PMP)®



# Phases of PMBOK

	<p><b>Initiate:</b> Form project team. Establish initial estimates for project outcome, schedule and costs. Authorize project to go forward.</p>	
	<p><b>Plan:</b> Develop project management plan. Develop a detailed statement of work (scope) and create project schedule. Identify measures of success.</p>	<p><b>Monitor &amp; Control</b> Throughout Plan &amp; Execute; identify, communicate and respond to project changes.</p>
	<p><b>Execute:</b> Direct and manage project execution. Create the end product of the project.</p>	
	<p><b>Close:</b> End the project. Obtain sponsor and customer approval. Transition to operations. Measure and celebrate success. Document lessons learned.</p>	

# Initiate

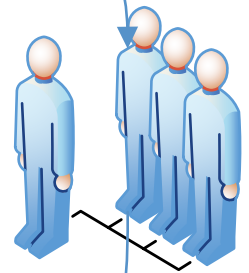
Development of Shared Structure



Documentation Templates



Hiring of Project Managers  
& Business Analysts



Service Inventory of Campus



**Plan**

Alignment of Services



Determine Service Movement



Develop Transition Schedule



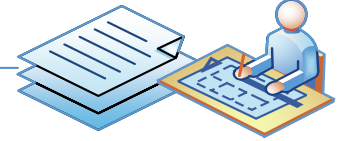


Execute

Assessment for Enterprise



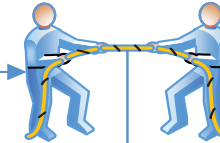
Document Workflow  
& Requirements



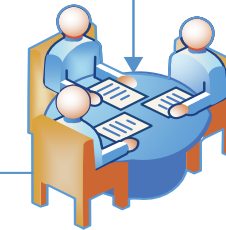
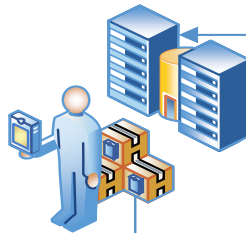
Establish SLA  
Governance & Advisory



Adjustment of Service



Implement Service  
&  
Operational Support



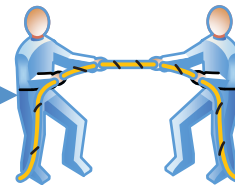
User Feedback



**Close**

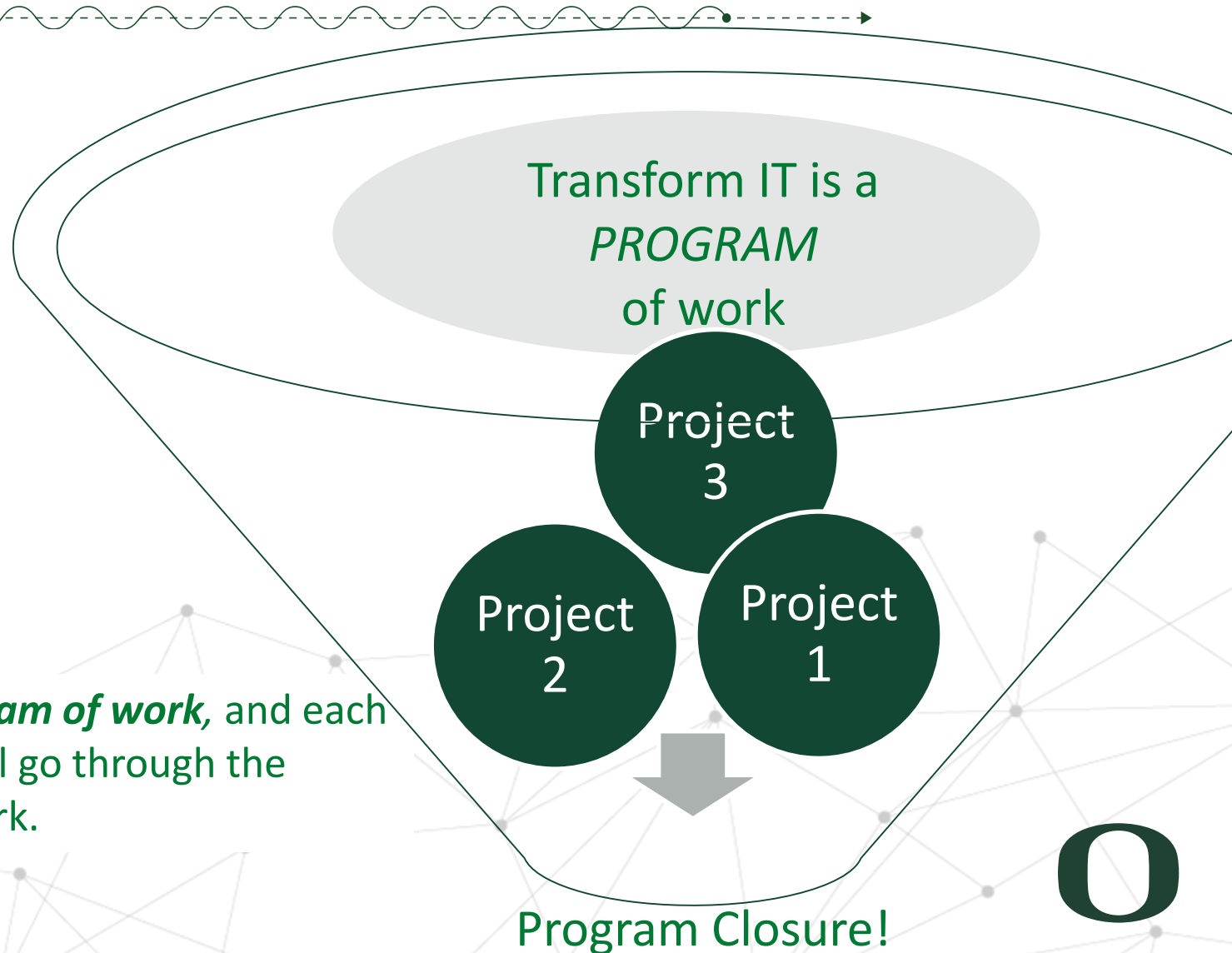


Post Implementation Feedback



Adjustment for future approach

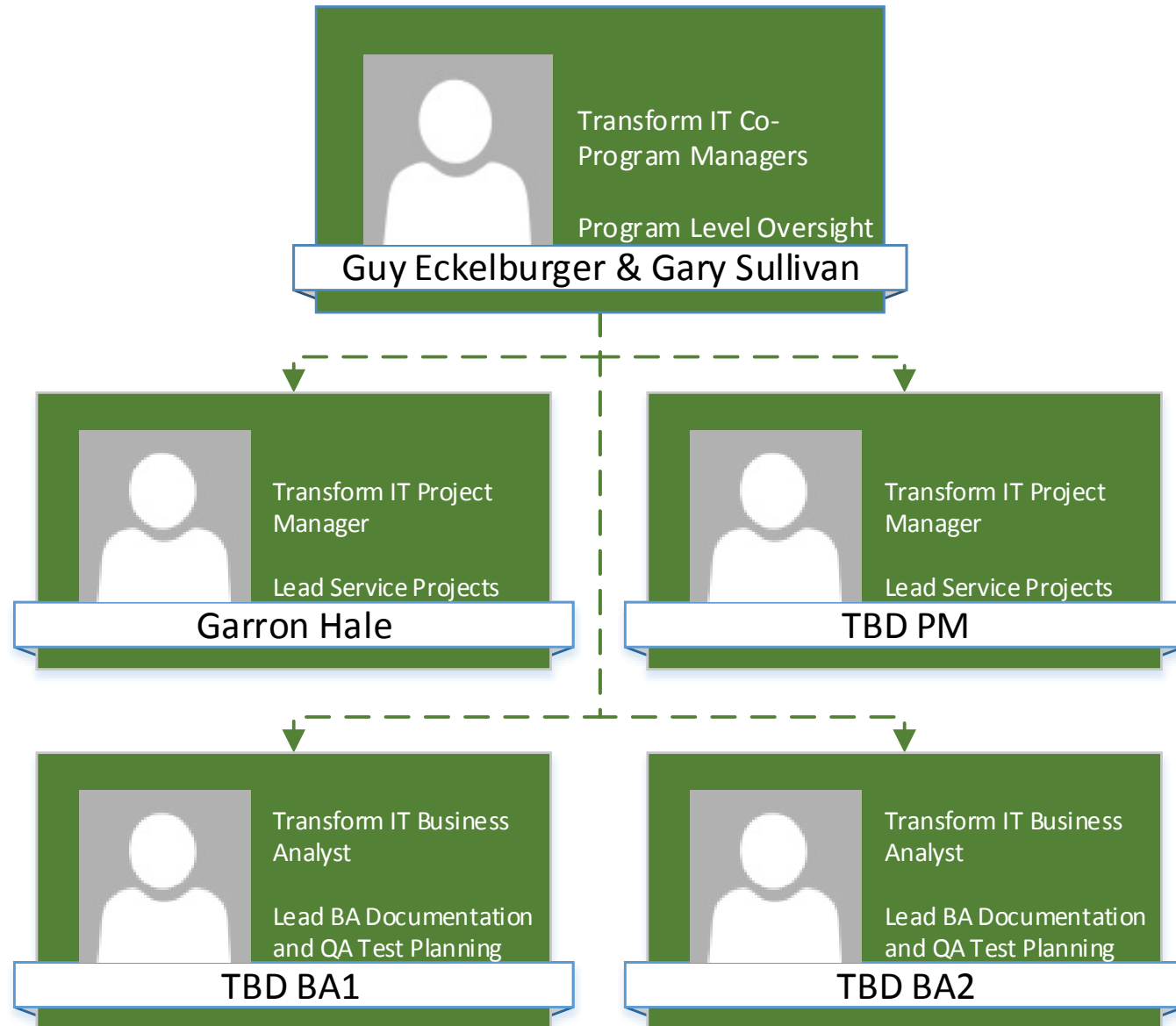
# So how does this apply to Transform IT?



The overall *program of work*, and each **project**, should all go through the PMBOK framework.

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# Transform IT Staffing



# Next Steps



- Project Management and Business Analyst positions currently posted
- Concurrently, leveraging existing staff to move forward on service inventory process
  - Validating data collected in past by consultants
  - Filling in gaps in data
- Alignment into a campus service catalog
- Determination by service which to move to IS, Library, or remain in place
- Service by service rationalization projects



# Questions?

A network diagram consisting of numerous small grey dots (nodes) connected by thin grey lines. The connections form a complex web of triangles and other polygons, filling the bottom half of the slide.

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# Appendix

A decorative background network diagram consisting of numerous small grey dots (nodes) connected by thin grey lines, forming a complex web-like structure.

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Phase	Activities
Initiate	<ul style="list-style-type: none"> <li>• Development of shared governance process and assembly of project teams</li> <li>• Hiring of Project Management and Business Analysis staff</li> <li>• Development of documentation templates for managing the program, understanding and documenting business processes, and gathering campus feedback and requirements</li> <li>• Service inventory of campus to understand what is being offered today by each unit, including budgets and staff resources</li> </ul>
Plan	<ul style="list-style-type: none"> <li>• Alignment of services from inventory into groups of like or similar services as appropriate</li> <li>• Determination by service for movement into IS, Library, or to remain in unit</li> <li>• Development of schedule for service transitions</li> </ul>
Execute	<ul style="list-style-type: none"> <li>• Documentation of user workflow related to service, user requirements for service</li> <li>• Assessment and selection of current applications/service for viability as enterprise offering</li> <li>• Establishment of service level agreements for enterprise service and support model, including user group advisory boards and inclusion with appropriate campus governance group.</li> <li>• Adjustment of selected enterprise service (if needed) to ensure match with user requirements</li> <li>• User feedback and testing of enterprise service</li> <li>• Implementation of enterprise service and migration to ongoing operational support status</li> </ul>
Close	<ul style="list-style-type: none"> <li>• Post-implementation feedback and assessment of learning experiences</li> <li>• Adjustment of future approach based upon assessment</li> </ul>



# PMBOK in Brief

Project Role	Responsibilities
<b>Executive Sponsor</b> <i>Source of funding and authorization for the project</i>	<ul style="list-style-type: none"><li>• Delivering on project benefits</li><li>• Providing strategic direction to team</li><li>• Monitoring project process</li><li>• Approving: final scope and scope changes, objectives, schedule, resources, roles &amp; responsibilities</li><li>• Resolving issues (people, money, equipment)</li><li>• Setting project priorities and removing barriers to project success</li></ul>
<b>Stakeholder</b> <i>May be actively involved in the project, or interests positively or negatively impacted by execution</i>	<ul style="list-style-type: none"><li>• Providing resources (time, money, etc.) to the project team</li><li>• Educating the project manager about their business</li><li>• Spending the time to provide and clarify precise and specific requirements</li><li>• Making timely decisions</li></ul>

Project Role	Responsibilities
<p><b>Project Manager</b>  <i>The person assigned to achieve the project's objectives</i></p>	<ul style="list-style-type: none"> <li>• Seeing a project through to its successful completion (scope, time and budget)</li> <li>• Ensuring that the appropriate project management framework is in place and that project management standards are applied to the project</li> <li>• Managing the day-to-day project activities</li> <li>• Maintaining an open line of communication to all interested parties</li> </ul>
<p><b>Project Steering Committee</b>  <i>Consists of executive level representation from the various stakeholder groups.</i></p>	<ul style="list-style-type: none"> <li>• Aligning project scope with the requirements of stakeholder groups</li> <li>• Representing stakeholder interests in project deliberations</li> <li>• Providing those directly involved in the project with guidance on business issues, especially issues which might compromise the success of the project</li> <li>• Ensuring effort and expenditure are appropriate to stakeholder expectations</li> <li>• Assisting in the evaluation of project risks, and project risk management approaches</li> <li>• Reconciling differences in opinion and approach, and resolving disputes arising from them</li> </ul>



Project Role	Responsibilities
<b>Project Team Member</b>	<ul style="list-style-type: none"><li>• Be an <i>active</i> team member</li><li>• Executing tasks</li><li>• Producing deliverables as outlined in the project plan and as directed by the Project Manager</li></ul>
<b>Functional Managers</b> <i>Managers who may not be directly involved, but oversee project team members</i>	<ul style="list-style-type: none"><li>• The day to day responsibilities for project team members</li><li>• Helps facilitate team members' schedules to free up time and make them available for the project</li></ul>

## Expectations of All Project Participants

It is crucial that all project participants follow these basic guidelines to help ensure project success:

***Listen*** and share information

***Contribute*** ideas and solutions

Be ***accountable*** and ***trust*** each other

***Participate*** fully and keep commitments



Definition	Initiate	Plan	Execute	Monitor and Control	Close
0-999 Hours	Project Charter Stakeholder Register Initiate Gate Meeting Form	Project Baselines Statement of Work Project Schedule Project Management Plan Document Mgmt Plan Baseline & Change Mgmt Plan (Scope & Schedule only) Issues Mgmt Plan Comms Mgmt Plan Plan Gate Meeting Form	None	Status Report Issue Register	Project Closure Form Post-Project Review Form
1000+ Hours	Project Charter Stakeholder Register Initiate Gate Meeting Form	Project Baselines Statement of Work Budget Tracker Project Schedule Project Management Plan Document Mgmt Plan Baseline & Change Mgmt Plan Resource Mgmt Plan Risk Mgmt Plan Issues Mgmt Plan Comms Mgmt Plan Plan Gate Meeting Form	None	Status Report Issue Register Risk Register Budget Tracker Change Request Form Change Register	Project Closure Form Post-Project Review Form