

August 2011: Ongoing Project Request Submission Process updates

Feedback on the last release:

In an effort to continually improve the OPRS, we'd like to hear some feedback from you on the items we tweaked during the last release. Here are a few things we updated last time:

- Made departmental strategic roadmaps available on the PPMO website
- We've updated workflow graphic for the process for clarity and replaced our old hallway signs with new ones.
- TeamDynamixHE has released an enhancement that allows project leads to provide more details about risks they envision for their projects, by adding a text comment to any risks that are identified.

Take our 4 question survey to help us understand more about how these changes worked for you: <https://www.surveymonkey.com/s/2T6WSK5>

For the second "release," of the OPRS here are the changes:

1. Based on some challenges and opportunities introduced with the release of TeamDynamix HE 7.1, **we have developed a beta workflow in TD to mirror the 9-step OPRS process.** For the next release of OPRS, we will work closely with OPRS stakeholders to develop a TD workflow utilizing the new capabilities that best meets the needs of the division.
2. The **monthly project status report will now include information for capital already allocated to projects in flight.** The SMT may choose to use this information as they review new project requests.
3. Guidance on the website and Project Lead Checklist has been adjusted to reflect that **project sponsors (or their designated ADs) are strongly encouraged to attend PPMO and architect consultations.**
4. At your request, **we've posted examples of some well-received project requests** that may help new project leads in their development process. You can find them here: <http://www.cmu.edu/computing/ppmo/project-initiation/ongoing-submission-process/step1/index.html>
5. Guidance on the website and Project Lead Checklist has been updated to more clearly reflect that **we can expedite the OPRS process as appropriate** to balance transparency and informed review against urgency.
6. **We now supply PDFs of project requests in many parts of the process** (Open Comments, PRRT meeting agendas, and SMT review), and the PPMO website in order to facilitate forwarding/access for divisional or external folks who don't have access to them within TD.

7. We've **made a few tweaks to the Project Lead Checklist**, including fixing a bug that resulted in broken links on some browsers. Use it early and often!
8. Based on your feedback, **Project Portfolio functionality has been developed within TD to allow program managers (those managing a series of related projects such as SII and CEID) to review their program as a portfolio**. New project requests will allow project leads to specify a related program: <http://www.cmu.edu/computing/ppmo/project-initiation/ongoing-submission-process/step1/index.html>

Program managers who would like to build a portfolio for their projects (or define a new program) should contact us for assistance.

On the Horizon:

These are things on deck for future releases/adjustments:

1. TD workflow adjustments as needed (see change #1 above)
2. Assess how well we are meeting our goals of linking project requests to divisional and departmental strategies. (Do the departmental strategy documents help at all?)
3. Review the goals and value of the Open Comment and PRRT review parts of the process; if Open Comment is heavily used, do we need/want PRRT review?
4. Revisit the potential need for periodic review of the entire project portfolio to adjust based on resource constraints and changing priorities
5. Integrate financial info for project allocations and expenditures into TD to ease monitoring and reporting.
6. Evaluate the use and guidance for project success criteria
7. Evaluate how we identify project risks – what should happen in the initiation phase? What should happen in the planning phase, after approval?

As always, we are interested in your feedback about the ongoing project request submission process – do these changes hit the mark for you? What should we be paying attention to for future releases? Please feel free to send mail or stop by to talk with Clay Fulton, Leah Lang or me anytime. Thanks!