


June 27, 2022

MEMORANDUM

TO: M. Katherine Banks, Ph.D.
President

FROM: Ed Pierson 
Working Group Chair

SUBJECT: Implementation Memo – Working Group # 38

Recommendation to be Implemented: Assign and train project managers through specialized training to ensure high quality management of new initiatives and consistent follow-through. Project Management Professional certification or a similar program is recommended. To address immediate enterprise-level issues, TAMU should partner with external project management services to accelerate implementation.

Strategic Considerations:

The Project Management working group is charged with providing insight into the formation of a single IT Project Management Office. The group should review, evaluate, and recommend strategies, processes, technologies, and methodologies that will serve and support the IT project initiatives across campus to ensure that state guidelines for Information Technology projects are met and that best practices in project management are applied to facilitate successful projects.

Each of the sub-groups for Working Group 38 agree that there is a need to create a centralized Project Management Office (PMO) that embeds project managers across IT functions and provides insight into the projects and supports the IT project initiatives across campus.

In the current IT Project Management infrastructure, there is not a unified approach to Project Management processes and procedures for IT projects across the University. The current campus environment consists of multiple, independent IT units, which manage projects using a multitude of methodologies, tools, resource pools, and reporting standards to complete projects. Though The Texas A&M University System has published best practices, templates, and a guide to assist with the interpretation and application of the Texas Administrative Code (TAC) 216, these resources are supportive in nature and are not required.

This environment poses many challenges to successfully managing projects across the enterprise including differing views of progress expressed by different parts of the organization, no visibility into what other units on campus are doing, delays in reporting that result in old data, and difficulty in implementing new or updated procedures or standards to meet state and system requirements. This has created a lack of visibility, accountability, reporting, and consistent processes. Additionally, there are

many units/departments who do not have formal processes, tools, or even defined project management roles or positions, which can cause inefficiencies, redundancies, and increased project timelines and costs.

The key issues considered in this recommendation address: how to create a centralized PMO, how to develop a training and professional development plan for the Project Managers, define what makes an effective PMO, and identify potential tools for project and portfolio management for the University. To address these considerations, the committee divided into four sub-groups, with each group focusing on a specific area of the recommendation. The expected outcome of this recommendation is that a consolidated PMO will oversee the projects and project portfolio to ensure consistent project delivery across all IT units. In this model, the PMO where Project Managers (PMs) have direct reporting structure to the PMO and dotted line reporting to their units.

Some of the main considerations the sub-groups identified in the current structure were:

- Very few units on campus had PMs
- There is no consistent approach to how projects are approved, tracked, managed, reported, etc. across the University
- The PMO and IT should align so that full portfolio considerations are addressed and unified
- A PMO is essential to deliver a consistent and increased value to IT customers
- PMs currently have no clear career path or professional development plan
- A centralized PMO needs to be established to provide methodologies that will serve and support the IT project initiatives across campus to ensure that state guidelines for Information Technology projects are met and that best practices in project management are applied to facilitate successful projects

Logistical Issues Addressed:

Mechanism for Implementing the Recommendations

The sub- groups acknowledged the need for a centralized “Controlling PMO” Model to create shared PMO responsibility for the University and suggested that the proper use of Organizational Change Management methodology will assist in gaining buy-in and adoption for the new PMO.

- Identifying a list of requirements for the tool as well as clear goals the PM tool will achieve.
- Forming a task force and using the Texas A&M RFP process for the tool selection. The taskforce should include any current users of the ServiceNow Project and Portfolio Suite, project managers from across the various IT units, representation from Compliance, Finance and Audit, and stakeholder representation in the form of both faculty and staff.
- Once a final decision has been made on a PM tool, an implementation plan should be followed to ensure a successful rollout
- Phased rollout to ensure that unit/department needs are met

Customer/Stakeholder Feedback Mechanism

Stakeholder and customer feedback should be gathered throughout the development of the centralized PMO process, including soliciting information on what tools have worked and not worked across

campus, during tool demos and during trials/testing. Customer feedback should be gathered through surveys and community of practice meetings.

Budget impact

The working group identified some of the following items that will have an impact on the PMO budget:

- Creation of the IT Project Manager Career path, which may impact existing PM salaries
- Equity review of existing PM titles across campus
- Upfront cost of the enterprise tool and licensing which could include a one-time services cost for configuration and onboarding
- Training and resources for support staff and end users
- Training budget for PMO to create communication and training to raise awareness of Project Management requirements/use across campus and ensure all who manage projects have shared vocabulary, knowledge, and understanding
- Data warehouse or reporting services

Organizational Impact

These are noted areas of impact that an enterprise Project Management Office will affect. These areas will need analysis and consideration as the PMO develops. Each of these areas have been addressed in the high-level timeline that follows.

- Business Relationship Managers (BRM's)
- Business Analysts
- Demand and Resource Management
- Governance
- Project Assignments
- Integration between IT Project Management and PM methodologies used by other units

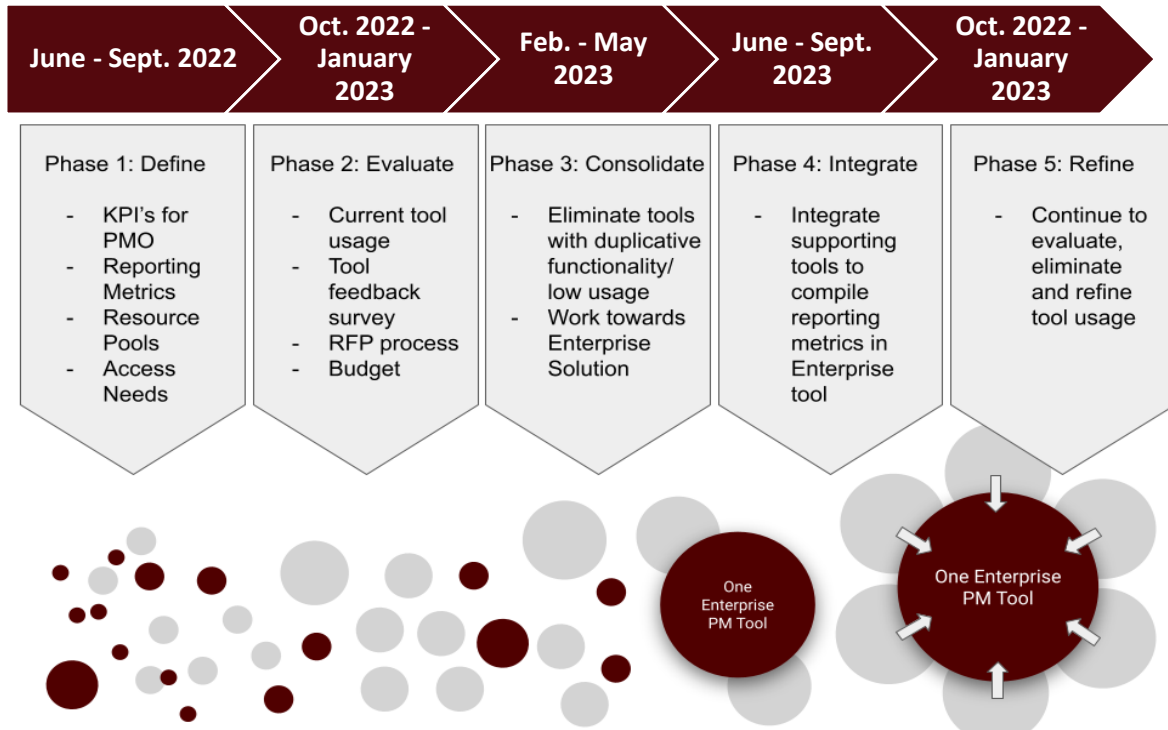
Major Challenges Encountered and Resolutions:

The working group identified some anticipated challenges associated with the proposed recommendations. One identified challenge is that a collection of Project Management tools are currently available to Project Managers on campus. Each unit selects their own product of choice to use. The group identified the need to select a best-in-class PM tool. The challenge may be that one tool may not integrate with the other lines of business and ITSM tools used in IT. If you select a best-in-class ITSM tool that provides PM functionality, it may not support the maturity of a PMO. However, this tool is a necessity as it will resolve the lack of visibility on project processes and outcomes that currently exist. Identifying a centralized tool that will support project management and the dependencies on other processes will provide some challenge.

Another challenge is that the current PM career ladder needs to be revised to support the IT PM roles. The working group has provided detailed suggestions for how this career ladder should be structured and how professional development and training should be designed to support the success and growth of PMs.

A third challenge identified by the working group is that there are no existing metrics that can be used to track PMO effectiveness. The working group outlined some methods and tools that could be used to collect, calculate and publish the PMO metrics.

Key Logistical Issues to be Completed and Timeline:

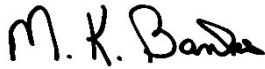


The enterprise Project Management Office (PMO) will be developed over the next 18 months in a phased rollout approach.

Summary

Working Group 38 agreed with MGT recommendation that the IT units on campus need to utilize Project Management methodologies to oversee their projects. The working group recommends that the University create a centralized PMO with Project Managers having solid line reporting to the PMO and dotted line reporting to their current functional supervisors. This organizational design will allow for shared services, cross-training, and succession planning, as needed. Project approval and request processes, product methodologies, project scoring and project management tools will be standardized and adopted across campus. As outlined above, clear career paths and professional development plans for PMs are strongly supported by the working group, as is the need for a unified set of project management tools to manage and the projects and the project portfolio.

Approved:



M. Katherine Banks, Ph.D.
President

August 12, 2022

Date

APPENDIX of Sub-Group Reports

Working Group 38 – Sub-Group 1: Project Management Organizational Design

Recommendation to be Implemented: The **organizational design** for university-wide IT Project Management.

Strategic Considerations: *Broad overview of the problem statement, the key strategies considered, why the recommended approach was taken, what we expect the outcome to be based on the recommendation.*

The Project Management working group is charged with providing insight into the formation of a single IT Project Management Office. The group should review, evaluate, and recommend strategies, processes, technologies, and methodologies that will serve and support the IT project initiatives across campus to ensure that state guidelines for Information Technology projects are met and that best practices in project management are applied to facilitate successful projects.

Objective 1

Create an organizational design that embeds project managers across IT functions and reports into a central Project Management Office (PMO).

Recommendations

Implement solid line reporting to the PMO and dotted line reporting to current functional supervisors. Project managers will ultimately report to the PMO. This organizational design will allow for shared services, cross-training, and succession planning, as needed.

All project management titles will report to the PMO, including existing and new positions.

All project assignments will be coordinated by the PMO according to project classifications and schedule availability. The PMO will provide the equivalency of the FTE(s) that the unit has employed.

Final design will largely depend on the work of other sub-groups that are finalizing job titles and forming the university's overall IT organizational structure.

Objective 2

Outline processes to consolidate existing project portfolios, inventory, and catalog of current projects.

Recommendations

To help identify and track the university's project portfolio, project leads will identify projects and submit status reports consistently on a schedule to be determined by the PMO.

There should be one mechanism for scoring all incoming projects, initiatives, and/or tasks.

Initially, Level 1 or Level 2 projects will stay at the unit level. Level 3 or higher projects will be coordinated through the PMO. All projects, regardless of level, will continue to be reported through monthly status updates to ensure visibility.

As an example, approved projects—regardless of methodology—can be tracked with the following basic information and grouped by unit (more information may be determined and requested by the PMO in the future):

- Project Number (assigned by the PMO)
- Title
- Charter/Description
- Milestones
- Level/Priority

- Methodology
 - Waterfall
 - Agile
 - Other
- Planned Start Date
- Planned End Date
- Percent Complete
- Requester(s)
- Sponsor(s)
- Primary Team
- Estimated Resource Allocation (hours, staffing, etc.)
- Lead
- Date of Most Recent Update
- Most Recent Updates/Comments

All current projects and project proposals should have a.) initial team members identified and b.) a high-level budget allocated, if appropriate, for approval by the PMO. Further upfront, known details regarding the 10 PMBOK Knowledge Areas (or additional criteria) will also be considered when inventorying projects.

Objective 3

Ensure that business leadership, deans, and college leaders are able to voice their IT project needs.

Recommendations

Consolidate existing project submission processes (as an example, the Division of IT's Project Proposal Laserfiche form) from units' intake methods to develop a final intake solution.

Lower-level project work that is not directly coordinated by the PMO—presumably simpler, less-involved initiatives or standard operational work—will not be tracked by the PMO and will rely on existing project management methodologies. However, leads may report their unit's overall workload and receive project management guidance from the PMO. This type of project work will also require consistent status reporting.

Objective 4

Develop a plan to request and prioritize current projects and ensure alignment with strategic objectives.

Recommendations

Overlaps with Objective 3's intake and demand management processes. Based on high-level tracking, leadership can prioritize projects, assign resources, and approve funding to move forward with project work.

Recommend a PMO Director to manage the university's portfolio; provide guidance regarding project management; align with strategic planning; and have a voice at leadership strategy and IT Governance meetings.

Objective 5

Consider how to balance project managers as a shared resource and determine resource utilization.

Recommendations

All project management titles will report to the PMO, including existing and new project management positions, which will allow for shared services, cross-training, and succession planning, as needed. Considered to be a subsequent phase as IT is reorganized throughout the university. Leadership—inclusive of a PMO Director—will assign projects to appropriate personnel and oversee the enterprise project portfolio.

Working Group 38 – Sub-Group 2: Project Manager Career Paths

Recommendation to be implemented:

The charter for Working Group 38 given from the MGT report reads:

The Project Manager (PM) working group is charged with providing insight into the formation of a single IT Project Management Office (PMO). The group should review, evaluate, and recommend strategies, processes, technologies, and methodologies that will serve and support the IT project initiatives across campus to ensure that State guidelines for Information Technology Projects are met and that best practices in Project Management are applied to facilitate successful projects. The deliverable will be a recommendation report of the group findings that will be provided to the Interim Vice President and Chief Information Officer.

On Feb 4, 2022 this subgroup was formed with the following charge:

Recommend a career path for Project Managers. Fashion a training plan with required training for project management methodology and determine approved supplemental project management tools. Consider the role of the BRM in relation to the Project Management Office (PMO).

To meet this charge, sub-group 38.2 focused efforts on the following four areas:

1. Recommend a Career Path for Project Managers
2. Fashion a Training Plan with Required Training for PM Methodology
3. Determine approved supplemental PM tools
4. Consider the role of BRM in relation to the PMO

Recommend a Career Path for Project Managers

Sub-group 38.2 worked closely with the PM working group chartered by the IT Advisory Committee (ITAC) to develop a career path and set of job profiles for the Project Specialist I-III and IT Project Manager I-IV career ladders (Appendix A). The Project Specialist career ladder already exists in the TAMU System, and requires only minor changes to the job profile as outlined in Appendix A.

Sub-group 38.2 supports the ITAC Working Group's recommendation of creating a new IT Project Manager I-IV career ladder which outlines years of experience, minimum qualifications, required and preferred certifications and a change from pay scale 10-13 to pay scale 67-73. As discussed in the ITAC recommendation, this change in pay scale better aligns the ladder in the IT pay scale range, supports a career path of IT Specialist to Project Manager, and brings salaries closer to industry standards for Project Management.

Additional work may be required once a PMO structure and IT Org Chart is created to better align roles the Project Manager Career Ladder can flow into for additional career growth.

The CIO's Office Chief of Staff interfaced with HR to determine feasibility of the recommendation and received positive feedback on the proposed changes.

Fashion a Training Plan with Required Training for PM Methodology

This sub-group reviewed industry standard Project Management certifications and training from several well-known organizations including the Project Management Institute, International Association of Project Managers, Scrum Alliance, Kanban Academy, and Lean Project Management Foundation. Additionally, this sub-group reviewed current training offerings from providers including LinkedIn Learning, Global Knowledge, and Pink Elephant to better understand the methodologies and knowledge levels provided by each.

Appendix B outlines the Project Specialist and IT Project Manager career ladders and aligns training topics under each for visual reference. TAMU staff not specifically in a Project Management position but desiring Project Management Training, may following the training path of Project Specialist.

Sub-group 38.2 recommends certification training and ancillary training be used for each position in the PM Career Ladder. Certification professionalizes the Project Management career ladder and improves employee competence, while ancillary training aims to provide foundational, intermediate, and advanced knowledge of topics apropos to current duties.

Certification Training

Since the recommended PM job profiles list required certifications, which each carry specific training requirements, managers and line supervisors should coach employees to achieve certification requirements as outlined in job profiles. Sub-group 38.2 recommends a Training Manager position reside within the PMO to build and maintain a list of approved certification training providers and negotiate contracts for each to provide management an easy path for staff certification.

Ancillary Training

Sub-group 38.2 recommends three Learning Paths be created in LinkedIn Learning to provide training on Foundational, Intermediate, and Advanced Project Management topics (see Appendix B) which can be aligned with specific positions and shepherded through effective management practices. Since Texas A&M currently offers LinkedIn Learning as a service to all employees, this is feasible with no additional budgetary consideration. Additional courses are available from external course providers at additional cost. Since courses and course providers change, subgroup 38.2 recommends a Training Manager position be established within the PMO to build and manage a current list of course offerings and negotiate training provider contracts to provide ancillary training as needed.

Determine approved supplemental PM tools

Sub-group 38.2 worked closely with sub-group 38.4, charged with evaluating Enterprise Project Management Tools, to conduct a survey of all tools currently in use at Texas A&M and other industry-recognized tools. Sub-group 38.4 will include enterprise tool recommendations in their report.

The Project Management Body of Knowledge recommends the use of automation tools, visual management tools, knowledge management tools to integrate the voluminous data and information created and necessary while managing projects. (PMBok 6th Ed., pg 73). The PMBoK further states the importance of Project Management Information Systems which PMI defines as:

“The PMIS provides access to Information Technology (IT) software tools such as scheduling software tools, work authorization systems, configuration management systems, information collection and distribution systems, as well as interfaces to other automated systems such as corporate knowledge

base repositories. Automated gathering and reporting on key performance indicators (KPIs) can be a part of this system” (PMBok 6th Ed., pg 95)

Subgroup 38.2 recommends the PMO be organized in a way where an enterprise-level PMIS can be governed and used to provide high-level oversight, budgeting, and reporting while also securing contracts for supplemental tools to be used by project teams.

The Project Management Institute recommends Project Managers select supplemental tools that keep project teams working with minimal disruption. As such Project Managers should be free to select the supplemental tool that will provide ease-of-use features tailored for the project being managed and the needs of the project team. A list of Supplemental tools, is provided in Appendix C. The PMO should consider negotiating Contracts for 3-5 of these tools to provide project managers with an array of tools for use on both waterfall and agile projects. Examples of these types of tools include Asana and Azure DevOps.

Consider the role of Business Relationship Management (BRM) in relation to the PMO

The BRM Institute states Business relationship Management as unique in that it is not only a role, but also a state of mind: a philosophy accompanied by a capability to transform the productivity of entire organizations (BRM Explained, 2021).

Simply stated, Business Relationship Management stimulates, surfaces, and shapes business demand for a provider’s products and services and ensures that the potential business value from those products and services is captured, optimized and recognized.

While the role of Business Relationship Management interfaces with the PMO to transform demand into strategic projects, it also functions across the IT organization as it interfaces with internal and external functions and organizations to generate ideas, shape demand, and deliver value.

“As it relates to project management, the business relationship management discipline tends to focus more on value generation for the organization in aggregate. This is largely due to the business relationship manager being uniquely positioned to have visibility into both the strategic domain and the execution domain activities in the organization...all of the work happening in the business relationship management discipline, including shaping demand and building idea documents, value plans, case studies, and working with the organization to sequence demand, becomes a series of inputs necessary to enable an effective project management discipline to turn those ideas into results.” (BRM Explained, pg 327)

To this end, sub-group 38.2 recommends the BRM function be housed at the CIO-level, rather than as a function of the PMO, and be organized to function at both the Strategic and Operational levels to surface and shape business demand for IT services across Texas A&M and to move Business and IT relationships to higher levels of maturity (figure 1).

RELATIONSHIP MATURITY MODEL

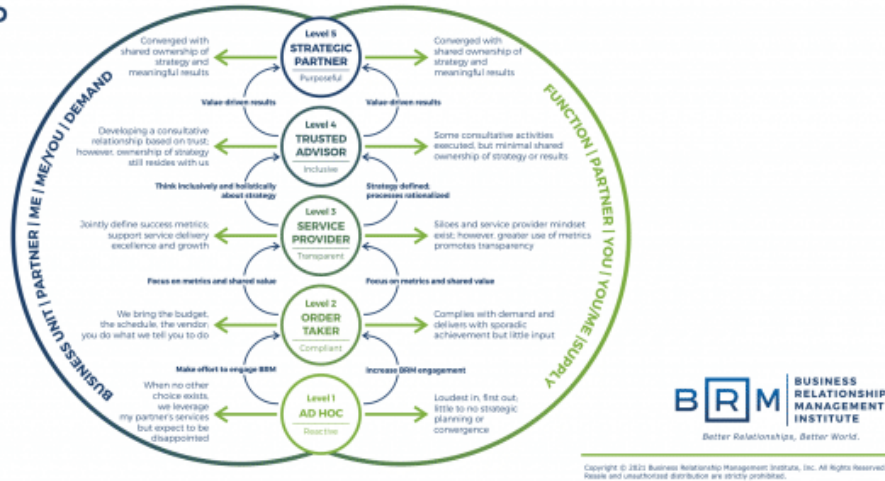


Figure 1. BRM Relationship Maturity Model

The BRM Institute discusses several BRM specialties which should be considered as the new IT organization is created at Texas A&M. These include: Technology BRM, People BRM, Finance BRM, BRM Consultant, External Relationships BRM, and BRM Capability Manager. In the context of Higher Ed, one might also consider Research BRM and Student Programs BRM.

Subgroup 38.2 reviewed BRM capabilities, training, and certification currently offered and recommends creation of an IT Business Relationship I-IV career ladder. Appendix D outlines a recommended BRM career path and provides IT BRM job profiles for consideration, while Appendix B outlines career path training aligned with each position.

Since the BRM Institute has only been in existence since 2013, the BRM discipline and capabilities are still maturing. However, the creation of the BRM Professional, Certified BRM, and Master BRM certifications provide a solid framework that can benefit organizations across Texas A&M.

Strategic Considerations:

Problem Statements

- A standardized Training Path for Project Managers, Business Analysts, and Business Relationship Managers does not currently exist
- No collection of supplemental Project Management tools currently available to Project Managers

Key Strategies considered

- A thorough review of Project Management and Business Relationship Management tools, methodologies, and industry standard training and certification completed. Offerings narrowed and aligned with current and proposed TAMU positions

Why the recommended approach was taken

- Industry-standard certifications and training adds to professionalism and rigor of career field

- Industry standard certifications widely supported by multiple training providers
- Training supports established Body of Knowledge Documentation
- Collection of supplemental tools provides capability to Project and Business Relationship Managers across the university

What we expect the outcome to be based on the recommendation

- Project Managers and BRM have a clear understanding of Career Progress opportunities
- Project Managers, Project Specialists, Business Analysts, and BRM have a clear training path to progress up their respective career ladder
- Project Managers have an array of supplemental tools available when managing projects
- BRM role integrated throughout the new Consolidated IT organization

Logistical issues Addressed

Mechanism for implementing the recommendations

- Creation of New IT Project Manager and IT Business Relationship Manager Career Ladders
- Proper use of Organizational Change Management methodology to gain buy-in and adoption (e.g. awareness sessions during Ed Talk, road shows, website FAQ, etc.)
- Contracts with identified Training Providers; consider purchase of subscription-based training for IT Professionals (I.e. GK Polaris, etc.)
- Contracts with key supplemental tools for use across campus
- Creation of PMO at CIO Level using “Controlling PMO” Model to create shared responsibility
- Creation of BRM Function at CIO level to interact with Internal/External customers, partners, and service providers

Budget Impact

- Professional Development budget considerations needed for IT professionals to keep stride with rapidly-changing landscape of technology
- Budget to purchase supplemental tool licenses managed by the PMO for Project Manager use across campus
- Training budget for PMO to create communication and training to raise awareness of Project Management requirements/use across campus and ensure all who manage projects have shared vocabulary, knowledge, and understanding
- Training budget for BRM to create communication and training to raise awareness of BRM role across campus and ensure internal/external partners have shared vocabulary, knowledge, and understanding

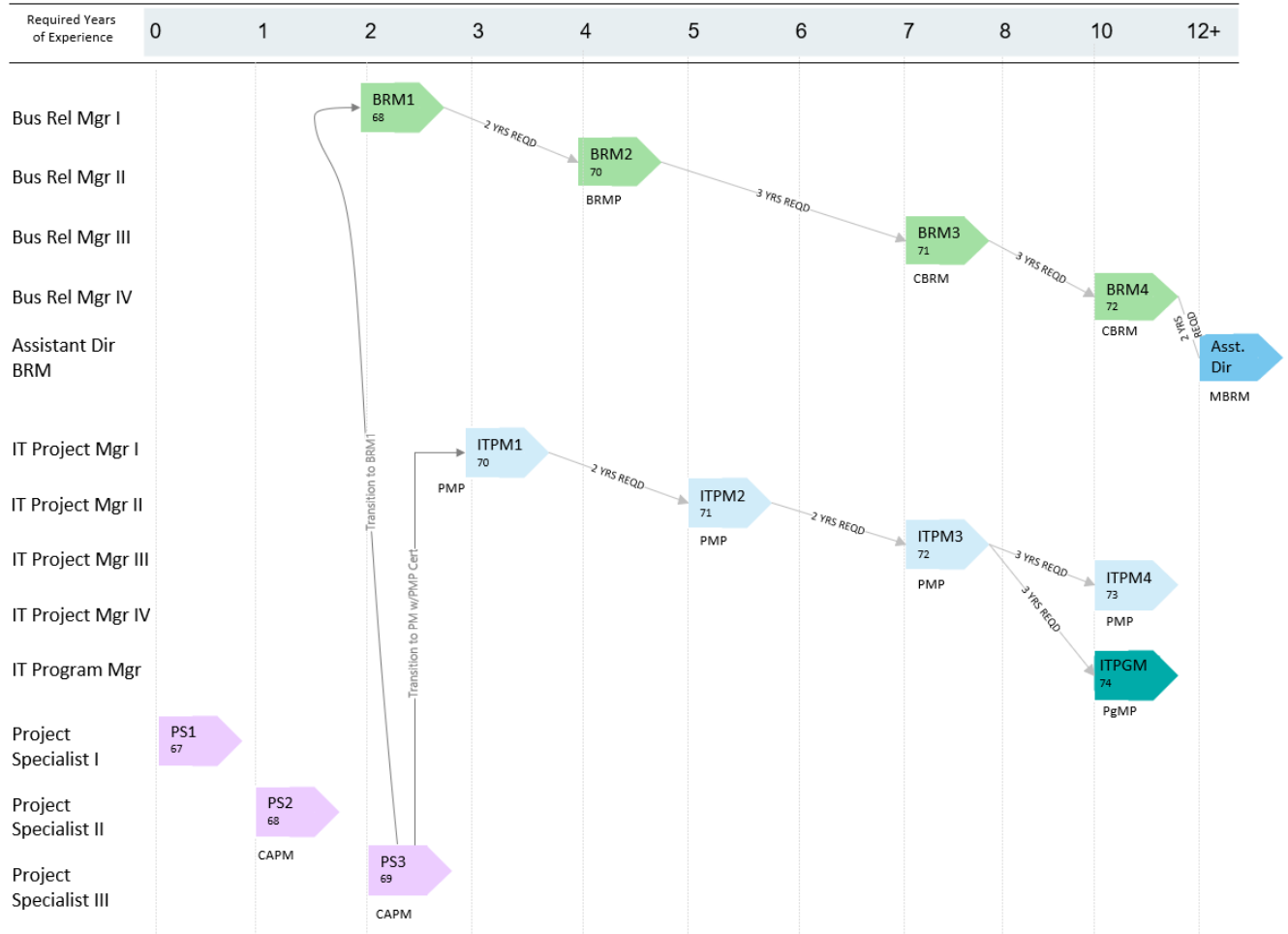
Major Challenges Encountered and Resolution:

Resources needed

- Supporting position (i.e. Training Manager) in PMO
- Professional Development Budget
- Training Provider Contracts
- Communication/Adoption Campaign

Appendix A - Sub-Group 2 Project Management Career Path & Job Profiles

Project Management and Business Relationship Manager Career Path



Appendix A (cont'd)

Project Manager Updated

Criteria		IT Project Manager I	IT Project Manager II	IT Project Manager III	IT Project Manager IV
Pay Grade		70	71	72	73
Salary Range	Proposed Low	\$56,582.74 - \$66,164.80	\$62,241.02 - \$72,800.00	\$68,465.12 - \$80,080.00	\$75,311.63 - \$88,088.00
	Proposed Mid	\$66,164.81 - \$80,891.20	\$72,800.01 - \$88,982.40	\$80,080.01 - \$97,884.80	\$88,088.01 - \$107,681.60
	Proposed Up	\$80,891.21 - \$90,532.38	\$88,982.41 - \$99,585.63	\$97,884.81 - \$109,544.19	\$107,681.61 - \$120,498.61
Working Titles	Proposed	Project Manager I	Project Manager II	Project Manager III	Lead Project Manager, Portfolio Manager
Education	Required	Bachelor's Degree or equivalent combination of training and experience. One year of required experience may substitute for one year of education.	Bachelor's Degree or equivalent combination of training and experience. One year of required experience may substitute for one year of education.	Bachelor's Degree or equivalent combination of training and experience. One year of required experience may substitute for one year of education.	Bachelor's Degree or equivalent combination of training and experience. One year of required experience may substitute for one year of education.
	Preferred	Bachelor's degree in Technology Management, Computer Science, Management Information Systems, or related field.	Bachelor's degree in Technology Management, Computer Science, Management Information Systems, or related field.	Bachelor's degree in Technology Management, Computer Science, Management Information Systems, or related field.	Bachelor's degree in Technology Management, Computer Science, Management Information Systems, or related field.
Experience	Required	Minimum 3 years of experience managing technology-related projects	PMP certification or 5 years of managing technology-related projects	Minimum 7 years of experience managing technology-related projects with minimum 2 years of experience as a Project Manager II (or comparable position).	Minimum 10 years of experience managing technology-related projects with minimum 3 years of experience as a Project Manager III (or comparable position).
	Preferred	3-5 years' experience managing Information Technology projects	5-7 years' experience managing Information Technology projects	7-10 years' experience managing Information Technology projects	10+ years' experience managing Information Technology projects
Licenses and Certifications	Required	Valid Texas driver's license or must acquire one within 30 days of employment.	Valid Texas driver's license or must acquire one within 30 days of employment.	Valid Texas driver's license or must acquire one within 30 days of employment.	Valid Texas driver's license or must acquire one within 30 days of employment.
	Preferred	Industry-standard Project Management Certification such as PMI Project Management Professional, IAPM Certified Project	Industry-standard Project Management Certification such as PMI Project Management Professional, IAPM Certified Project	PMI Project Management Professional, IAPM Sr. Project Manager, IPMA Certified PM or any equivalent industry standard PM certification. Years of experience may substitute but	PMI Project Management Professional, IAPM Certified Sr. Project Manager, IPMA Certified Sr. P3 Manager or any equivalent industry standard PM certification. Years of experience

		Manager, IPMA Certified Project Manager	Manager, IPMA Certified Project Manager	will require certification within one year of employment in one of these areas of project management. Training may be employer provided. Industry-standard Project Management certification such as PMI-Risk Management Professional, PMI Agile Hybrid Project Pro, IAPM Certified Sr. Project Manager, IPMA Certified Sr. P3 Manager.	may substitute but will require certification within one year of employment in one of these areas of project management or an equivalent project management area of study. Training may be employer provided. Advanced industry-standard Project Management certification such as PMI Portfolio Management Professional, PMI Program Management Professional, IAPM Certified International Project Manager, IPMA Certified P3 Director.
Knowledge, Abilities Skills	Required	<ul style="list-style-type: none"> Ability to manage small to medium level projects. Ability to manage concurrent projects in a cross-functional environment. Demonstrated skills in leadership, negotiation, conflict management, collaboration, organizational and critical thinking. Working knowledge of the project lifecycle and formal project management methodologies. Experience with project management software tools. 	<ul style="list-style-type: none"> Ability to lead concurrent small to medium level project teams. Ability to manage concurrent projects in a cross-functional environment. Demonstrated skills in leadership, negotiation, conflict management, collaboration, organizational and critical thinking. Working knowledge of project lifecycle and formal project management methodologies. Experience with project management software tools. 	<ul style="list-style-type: none"> Ability to lead concurrent medium to large level project teams. Ability to apply program management principles to manage a collection of aligned projects Demonstrated skills in leadership, negotiation, conflict management, collaboration, organizational and critical thinking. Application of project lifecycle and formal project management methodologies. Experience with project management software tools. 	<ul style="list-style-type: none"> Ability to lead concurrent large, high-complexity, project teams. Ability to apply program and portfolio management principles to lead a collection of related projects, programs, or portfolios. Demonstrated skills in leadership, negotiation, conflict management, collaboration, organizational and critical thinking. Application of project lifecycle and formal project management methodologies. Experience with project management software tools.
	Preferred	Experience with Texas State Information Resources Project Requirements.	Experience with Texas State Information Resources Project Requirements.	Experience with Texas State Information Resources Project Requirements.	Experience with Texas State Information Resources Project Requirements.
Other Factors	Required	Ability to multi-task and work cooperatively with others. Able to work in a collaborative team environment. Possess strong interpersonal, written and verbal communication skills. Occasional travel.	Ability to multi-task and work cooperatively with others. Able to work in a collaborative team environment. Possess strong interpersonal, written and verbal communication skills. Occasional travel.	Ability to multi-task and work cooperatively with others. Able to work in a collaborative team environment. Possess strong interpersonal, written and verbal communication skills. Occasional travel.	Ability to multi-task and work cooperatively with others. Able to work in a collaborative team environment. Possess strong interpersonal, written and verbal communication skills. Occasional travel.

<p style="text-align: center;">Duties</p>	<p>Required</p>	<ul style="list-style-type: none"> • Manages projects in line with business strategies and in accordance with project management standards. • Periodically conducts meetings with stakeholders to schedule and coordinate project activities. • Coordinates project resources in conjunction with resource holders and other project managers. • Manages projects that the problem and solution are usually defined and easy to achieve. • Manages project quality control and assurance. • Establishes goals for project delivery. • Applies current best practices in vendor selection, contract negotiation, and project lifecycle. • Provides input on designated budget that usually has a minor impact on financial revenue and expenses. • Manages and supervises project team. • Performs other related duties as assigned • Analyzes data and produces reports for all stakeholders. • Provides Project Management leadership to stakeholders by... (foster a culture of collaboration, innovation, transparency, and accountability within project teams, meeting facilitation, negotiating scope changes, schedule changes, etc.) • Develops, implements, and tracks timelines, budgets, and deliverables. • Independently analyze, prioritize, document, track and communicate project risks, issues, and decisions to project sponsors. 	<ul style="list-style-type: none"> • Manages projects in line with business strategies and in accordance with project management standards. • Periodically conducts meetings with stakeholders to schedule and coordinate project activities. • Coordinates project resources in conjunction with resource holders and other project managers. • Manages projects that the problem and solution are usually defined and easy to achieve. • Manages project quality control and assurance. • Establishes goals for project delivery. • Applies current best practices in vendor selection, contract negotiation, and project lifecycle. • Provides input on designated budget that usually has a minor impact on financial revenue and expenses. • Manages and supervises project team. • Performs other related duties as assigned • Analyzes data and produces reports for all stakeholders. 	<ul style="list-style-type: none"> • Manages projects in line with business strategies and in accordance with project management standards. • Periodically conducts meetings with stakeholders to schedule and coordinate project activities. • Coordinates project resources in conjunction with resource holders and other project managers. • Manages projects that the problem and solution are usually defined and easy to achieve. • Manages project quality control and assurance. • Establishes goals for project delivery. • Applies current best practices in vendor selection, contract negotiation, and project lifecycle. • Provides input on designated budget that usually has a minor impact on financial revenue and expenses. • Manages and supervises project team. • Performs other related duties as assigned • Analyzes data and produces reports for all stakeholders. • Solid knowledge and understanding of business needs, with the ability to establish and maintain a high-level of customer trust and confidence. • Demonstrated ability to multitask and manage concurrent projects in a cross-functional environment. • Demonstrated knowledge of the project lifecycle and formal project management methodologies. 	<ul style="list-style-type: none"> • Manages project portfolios in line with business strategies and in accordance with project management standards. • Periodically conducts meetings with stakeholders to schedule and coordinate project activities. • Coordinates project resources in conjunction with resource holders and other project managers. • Manages projects that the problem and solution are usually defined and easy to achieve. • Manages project quality control and assurance. • Establishes goals for project delivery. • Applies current best practices in vendor selection, contract negotiation, and project lifecycle. • Provides input on designated budget that usually has a minor impact on financial revenue and expenses. • Manages and supervises project team. • Performs other related duties as assigned • Analyzes data and produces reports for all stakeholders. • Ability to analyze data and produce reports for all stakeholders. • Generates and communicates new ideas and suggestions that improve efficiency, quality and service. • Manages project portfolios in line with business strategies and in accordance with project management standards. Periodically conducts meetings with stakeholders to schedule and coordinate project activities.
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		<ul style="list-style-type: none">• Ability to create long- and short-term plans, including setting targets for milestones and adhering to deadlines• Performing quality control on projects throughout to maintain expected standards• Ability to make independent decisions to ensure how to progress with a project including how to adjust schedules and targets.			
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Project Specialist Updated

Criteria		Project Specialist I	Project Specialist II	Project Specialist III
Pay Grade		10	12	13
Salary Range	Proposed Low	\$40,712.00 - \$52,312.00	\$50,162.00 - \$64,480.00	\$55,412.00 - \$71,219.20
	Proposed Mid	\$52,312.01 - \$63,960.00	\$64,480.01 - \$78,811.20	\$71,219.21 - \$87,068.80
	Proposed Up	\$63,960.01 - \$75,608.00	\$78,811.21 - \$93,158.00	\$87,068.81 - \$102,908.00
Working Titles	Proposed	Project Specialist I	Project Specialist II	Project Specialist III
Education	Required	Bachelor's Degree. An equivalent combination of education and experience may be considered.	Bachelor's Degree. An equivalent combination of education and experience may be considered.	Bachelor's Degree. An equivalent combination of education and experience may be considered.
	Preferred	Bachelor's degree in Computer Science, MIS, Engineering or related field.	Bachelor's degree in Computer Science, MIS or Engineering.	Bachelor's degree in Computer Science, MIS or Engineering.
Experience	Required	0 – 3 years	1-3 years	2-5 years
	Preferred	Experience in project management.	Experience in project management.	Experience in project management.

Licenses and Certifications	Required	Valid Texas driver's license or must acquire one within 30 days of employment.	Valid Texas driver's license or must acquire one within 30 days of employment.	Valid Texas driver's license or must acquire one within 30 days of employment. PMI Certified Associate in Project Management, IAPM Certified Jr. Project Manager, IPMA Certified Project Management Associate or any equivalent industry standard PM certification. Years of experience may substitute but will require certification within one year of employment in one of these areas of project management. Training may be employer provided.
	Preferred	Project Management related credential or certification such as PMI Project Management Ready or an industry standard Project Management certification equivalent.	Industry-standard Project Management certification such as PMI Certified Associate in Project Management, IAPM Certified Jr. Project Manager, IPMA Certified Project Management Associate or an industry standard Project Management certification equivalent.	Industry-standard Project Management certification such as PMI-Risk Management Professional, PMI Agile Hybrid Project Pro, IAPM Certified Sr. Project Manager, IPMA Certified Sr. P3 Manager or an industry standard Project Management certification equivalent.

Knowledge, Abilities, Skills	Required	<p>Possesses effective communication skills, both verbal and written and has good listening skills</p> <p>Exhibits excellent interpersonal skills for collaborating effectively with others</p> <p>Has strong attention to detail and problem-solving skills</p> <p>Is highly organized in both time and resources and able to multi-task</p> <p>Works efficiently to meet strict deadlines</p> <p>Has an analytical and critical mindset</p> <p>Basic knowledge of the project lifecycle and formal project management methodologies.</p>	<p>Possesses effective communication skills, both verbal and written and has good listening skills</p> <p>Exhibits excellent interpersonal skills for collaborating effectively with others</p> <p>Has strong attention to detail and problem-solving skills</p> <p>Is highly organized in both time and resources and able to multi-task</p> <p>Works efficiently to meet strict deadlines</p> <p>Has an analytical and critical mindset</p> <p>Working knowledge of the project lifecycle and formal project management methodologies.</p>	<p>Possesses effective communication skills, both verbal and written and has good listening skills</p> <p>Exhibits excellent interpersonal skills for collaborating effectively with others</p> <p>Has strong attention to detail and problem-solving skills</p> <p>Is highly organized in both time and resources and able to multi-task</p> <p>Works efficiently to meet strict deadlines</p> <p>Has an analytical and critical mindset</p> <p>Experience with project management methodologies</p>
	Preferred	<p>Some experience with project management software tools.</p>	<p>Experience with project management software tools.</p>	<p>Experience with project management software tools.</p> <p>Experience with project management schedules, communication, risk and stakeholder management</p>

Duties	Required	<p>Participates in program and project development, disseminates project information, and serves as an active participant in project related work groups and committees. Assists in providing recommendations to achieve goals.</p> <p>Assists with the planning, developing, implementation, and evaluation of programs and projects. Assists in developing project budgets and preparing contracts. May manage budget for small projects or components of large programs under the direction of program director.</p> <p>Coordinates project activities, collaborates with project team members, assists in the development of measurable project goals and objectives, and monitors progress toward achievement.</p> <p>Prepares agendas for meetings, documents key decisions, and collaborates with team members to develop project collateral.</p> <p>Assists in writing and disseminating work plans and project documents to include procedures, proposals, progress reports, and presentations.</p> <p>Performs other related duties as assigned.</p>	<p>Performs intermediate program and project development, disseminates project information, and serves as an active participant in project related work groups and committees. Provides recommendations to achieve goals.</p> <p>Plans, develops, implements, and evaluates programs and projects. Develops project budgets and prepares contracts. May manage budget for small to medium projects or components of large programs under the direction of program director.</p> <p>Coordinates project activities, collaborates with project team members, assists in the development of measurable project goals and objectives, and monitors progress toward achievement.</p> <p>Prepares agendas for meetings, documents key decisions, and collaborates with team members to develop project collateral.</p> <p>Writes and disseminates work plans and project documents to include procedures, proposals, progress reports, and presentations.</p> <p>Performs other related duties as assigned.</p>	<p>Performs advanced program and project development, disseminates project information, and serves as an active participant in project related work groups and committees. Provides recommendations to achieve goals.</p> <p>Plans, develops, implements, and evaluates programs and projects. Develops project budgets and prepares contracts. Manages budgets for project or program.</p> <p>Coordinates project activities, collaborates with project team members, develops measurable project goals and objectives, and monitors progress toward achievement.</p> <p>Prepares agendas for meetings, documents key decisions, and collaborates with team members to develop project collateral.</p> <p>Develops and disseminates work plans and project documents to include procedures, proposals, progress reports, and presentations. Develops and prepares training and operational manuals.</p> <p>Performs other related duties as assigned.</p>

Appendix B - Sub-Group 2
Project Management, Business Analysis, BRM Training Alignment

	Project Specialist I	Project Specialist II	Project Specialist III	IT Project Manager I (PMP/IAPM)	IT Project Manager II (PMP/IAPM)	IT Project Manager III (PMP/IAPM)	IT Project Manager IV (PMP/PfMP)				
	Project Management Foundations		IT Project Management		Agile Project Management (CSM, PO, PMI-ACP)		Portfolio Management (PfMP)				
	Business Analysis Essentials										
	PM Foundations (LinkedIn Learning)			PM Intermediate (LinkedIn Learning)			PM Advanced (LinkedIn Learning)				
	IT Business Analyst I	IT Business Analyst II (PMI-PBA/CBAP)	IT Business Analyst III (PMI-PBS/CBAP)	IT Business Analyst IV (PMI-PBA/CBAP)							
	Business Analysis Essentials		Business Analysis Agile								
	Business Process Analysis										
	BA Foundations (LinkedIn Learning)			BA Intermediate (LinkedIn Learning)		BA Advanced (LinkedIn Learning)					
	IT Business Relationship Manager I	IT Business Relationship Manager II (BRMP)	IT Business Relationship Manager III (CBRM)		IT Business Relationship Manager IV (MBRM)						
	IT BRM	Business Analysis Essentials									
	BRM Foundations (LinkedIn Learning)			BRM Intermediate (LinkedIn Learning)		BRM Advanced (LinkedIn Learning)					
YEARS	0	1	2	3	4	5	6	7	8	9	10+

**Appendix C - Sub-Group 2
Supplemental Project Management Tools**

Tool	Collaboration	Communication	Task Management	Reporting/ Visualization
Google Suite	Y	Y	Y	Y
Microsoft 365:	Y	Y		
- Planner	Y	Y	Y	Y
- Visio	Y			Y
- Powerpoint	Y	Y		Y
- Excel	Y		Y	Y
- Word	Y			Y
- Project	Y		Y	Y
- Lists	Y	Y	Y	Y
- Whiteboard	Y	Y		Y
- PowerBI		Y		Y
- Teams	Y	Y	Y	Y
Asana	Y	Y	Y	Y
Trello	Y	Y	Y	Y
Monday	Y	Y	Y	Y
Azure DevOps	Y	Y	Y	Y
SmartSheet	Y		Y	
Mural	Y	Y		Y

Current TAMU Enterprise License	No Current TAMU Enterprise License
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**Appendix D - Sub-Group 2
Business Relationship Management Career Path and Job Profiles**

Criteria		IT Business Relationship Manager I	IT Business Relationship Manager II	IT Business Relationship Manager III	IT Business Relationship Manager IV	Assistant Director, Business Relationship Management
Pay Grade		68	70	71	73	76
Salary Range	Proposed Low	\$46,762.59 - \$54,704.00	\$56,582.74 - \$66,164.80	\$62,241.02 - \$72,800.00	\$75,311.63 - \$88,088.00	\$100,239.78 - \$117,270.40
	Proposed Mid	\$54,704.01 - \$66,851.20	\$66,164.81 - \$80,891.20	\$72,800.01 - \$88,982.40	\$88,088.01 - \$107,681.60	\$117,270.41 - \$143,332.80
	Proposed Up	\$66,851.21 - \$74,820.14	\$80,891.21 - \$90,532.38	\$88,982.41 - \$99,585.63	\$107,681.61 - \$120,498.61	\$143,332.81 - \$160,383.65
Working Titles	Proposed					
Education	Required	Bachelor's Degree or equivalent combination of training and experience. One year of required experience may substitute for one year of education.	Bachelor's Degree or equivalent combination of training and experience. One year of required experience may substitute for one year of education.	Bachelor's Degree or equivalent combination of training and experience. One year of required experience may substitute for one year of education.	Bachelor's Degree or equivalent combination of training and experience. One year of required experience may substitute for one year of education.	Bachelor's Degree or equivalent combination of training and experience. One year of required experience may substitute for one year of education.
	Preferred	Bachelor's Degree in Business or Technology-related field	Bachelor's Degree in Business or Technology-related field	Bachelor's Degree in Business or Technology-related field	Bachelor's Degree in Business or Technology-related field	Master's Degree in Business or Technology-related field
Experience	Required	Minimum 2 years of customer service experience	Minimum 4 years combined experience in customer service and business relationship management	Minimum 7 years combined experience in customer service and business relationship management	Minimum 10 years combined experience in customer service and business relationship management	Minimum 12 years combined experience in customer service and business relationship management

	Preferred		Minimum 2 years of experience functioning as a business relationship manager	Minimum 1 year experience leading teams Minimum 4 years of experience functioning as a business relationship manager	Minimum 3 years experience leading teams Minimum 8 years of experience functioning as a business relationship manager	Minimum 5 years experience leading teams Minimum 10 years of experience functioning as a business relationship manager
Licenses and Certifications	Required	Valid Texas driver's license or must acquire one within 30 days of employment.	Valid Texas driver's license or must acquire one within 30 days of employment. Business Relationship Management Professional (BRMP) within 1 year	Valid Texas driver's license or must acquire one within 30 days of employment. Business Relationship Management Professional (BRMP)	Valid Texas driver's license or must acquire one within 30 days of employment. Certified Business Relationship Manager (CBRM) within 1 year	Valid Texas driver's license or must acquire one within 30 days of employment. Master of Business Relationship Management (MBRM) within 1 year
	Preferred	Business Relationship Management Professional (BRMP)	Business Relationship Management Professional (BRMP)	Certified Business Relationship Manager (CBRM)	Project Management Professional (PMP)	Project Management Professional (PMP) or Project Portfolio Management Professional (PfMP)
Knowledge, Abilities, Skills	Required	Ability to communicate in writing, speaking and presenting Ability to build relationships and collaborate with teams.	Ability to communicate in writing, speaking and presenting Ability to build relationships and collaborate with teams.	Enhanced ability to communicate in writing, speaking and presenting Enhanced ability to build relationships and collaborate with teams.	Superior ability to lead now-to-new change using positive and collaborative methods Superior communication skills in writing, speaking and presenting	Exceptional ability to lead now-to-new change using positive and collaborative methods Exceptional communication skills in writing, speaking and presenting
	Preferred	Ability to listen, build rapport, and develop credibility as a strategic partner Experience dealing with difficult customers	Ability to listen, build rapport, and develop credibility as a strategic partner Experience dealing with difficult customers	Ability to listen, build rapport, and develop credibility as a strategic partner Experience dealing with difficult customers	Superior ability to build relationships and collaborate with teams. Enhanced experience with relationship building and team collaboration	Exceptional ability to build relationships and collaborate with teams. Master of relationship building and team collaboration

			<p>Ability to focus on purpose, value, and results, rather than solutions</p> <p>Ability to think strategically</p>	<p>Capable of setting expectations with partners and achieving alignment and agreement</p> <p>Ability to think strategically</p>	<p>Ability to break down silos both inside and outside an organization</p> <p>Skilled and experienced at conflict negotiation and problem-solving</p> <p>Capable of setting expectations with partners and achieving alignment and agreement</p>	<p>Ability to break down silos both inside and outside an organization</p> <p>Skilled and experienced at conflict negotiation and problem-solving</p> <p>Enhanced experience with setting expectations with partners and achieving alignment and agreement</p> <p>Ability to focus on purpose, value, and results, rather than solutions</p>
Other Factors	Required					
Duties	Required	<p>Meet with stakeholders to build and maintain relationships between the Division of IT and its internal and external partners.</p> <p>Monitor customer satisfaction, understanding and relaying customer needs to the rest of the organization.</p>	<p>Develop and manage the relationship between the Division of IT and internal and external partners</p> <p>Monitor customer satisfaction, understanding and relaying customer needs to the rest of the organization.</p>	<p>Develop and manage the relationship between the Division of IT and internal and external partners</p> <p>Monitor customer satisfaction, understanding and relaying customer needs to the rest of the organization. Develop plans to</p>	<p>Enhance and continually develop the relationships between the Division of IT and internal and external partners</p> <p>Monitor customer satisfaction, understanding and relaying customer needs to the rest of the organization. Develop plans to address customer needs.</p>	<p>Meet with executives and leaders to build relationships between the Division of IT and its internal and external partners</p> <p>Create strategies, surveys, RSOAP's for business partners.</p> <p>Manages day-to-day activities of the Business Relationship Management</p>

		<p>Work with management in developing timely solutions for client requirements.</p> <p>Address customer issues/concerns in an accurate and timely manner</p> <p>Work closely with clients to understand the business needs and to explore opportunities for growth</p> <p>Assists Division of IT teams with project and initiative progress, including consistent and effective communication, risk management, and issue escalations</p> <p>Provides training to Division business partners on the use of technology services</p> <p>Assists in the development of relationship plans and reports</p>	<p>Work with management in developing timely solutions for client requirements.</p> <p>Address customer issues/concerns in an accurate and timely manner</p> <p>Work closely with clients to understand the business needs and to explore opportunities for growth</p> <p>Assists Division of IT teams with project and initiative progress, including consistent and effective communication, risk management, and issue escalations</p> <p>Provides training to Division business partners on the use of technology services</p> <p>For each business unit, develop technology strategies that align within the overall business strategy</p> <p>Develops relationship</p>	<p>address customer needs.</p> <p>For each business unit, develop technology strategies that align within the overall business strategy</p> <p>Address customer issues/concerns in an accurate and timely manner</p> <p>Meet regularly with clients to understand the business needs and to suggest and explore opportunities for growth</p> <p>Work closely with the Division of IT teams to monitor project and initiative progress, including consistent and effective communication, risk management, and issue escalations</p> <p>Creates and provides training to Division business partners on the use of technology services</p> <p>For each business unit, develop technology strategies that align within the</p>	<p>For each business unit, develop technology strategies that align within the overall business strategy</p> <p>Address customer issues/concerns in an accurate and timely manner.</p> <p>Meet regularly with clients to understand the business needs and to suggest and explore opportunities for growth</p> <p>Work closely with the Division of IT teams to monitor project and initiative progress, including consistent and effective communication, risk management, and issue escalations</p> <p>Champion a culture of shared ownership and constant organizational evolution</p> <p>Collaborate with leaders across the organization</p> <p>Drive Service Level Agreement (SLA) negotiations to enhance value to the client business unit</p> <p>Represent the Division at internal and external meetings, working groups, committees,</p>	<p>Program (BRM) for the department to ensure it meets organization goals and requirements</p> <p>Recruits, hires, and directly supervises business relationship management staff and coordinates work to support communication, training, and strategy objectives</p> <p>Meet regularly with clients to understand the business needs and to suggest and explore opportunities for growth</p> <p>Enforces ethical, regulatory, and performance standards</p> <p>Encourages teamwork and collaboration to support department strategy, and serves as liaison between BRM team and other functional teams within the university</p> <p>Champion a culture of shared ownership and constant organizational evolution</p> <p>Collaborate with leaders across the organization</p> <p>Drive Service Level Agreement (SLA) negotiations</p>
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			<p>plans and reports</p> <p>Knowledge in subject matters pertaining to both IT and the business and understand the business to identify needs.</p>	<p>overall business strategy</p> <p>Develops relationship plans and reports</p> <p>Enhanced knowledge in subject matters pertaining to both IT and the business and understand the business to identify needs.</p> <p>Work closely with clients to understand the business needs and to explore opportunities for growth</p> <p>Partner with leaders both inside and outside the organization to collaborate and ensure meaningful results from our strategic initiatives.</p>	<p>discussions and meetings with management, and as required, act as an alternative for the Assistant Director</p> <p>Plans, creates and conducts presentations to staff and partners on technological trends and developments;</p> <p>Travels to the Regional Offices, partner locations and IT conferences on technological innovations, trends and developments.</p> <p>Manager utilizes significant knowledge in subject matters pertaining to both IT and the business and must have a thorough understanding of the business to identify its needs and envisage business solutions.</p> <p>Maintains communication processes and channels across business functions</p> <p>Coaches, trains and mentors BRM team members.</p> <p>Manage the strategic relationship between the BRM function and partners to stimulate, surface, and shape demand</p>	<p>to enhance value to the client business unit</p> <p>Plans, creates and conducts presentations to staff and partners on technological ends and developments;</p> <p>Travels to the Regional Offices, partner locations and IT conferences on technological innovations, trends and developments.</p> <p>Own the strategic relationship between the BRM function and partners to stimulate, surface, and shape demand</p> <p>Assistant Director utilizes expert knowledge in subject matters pertaining to both IT and the business and must have a thorough understanding of the business to identify its needs and envisage business solutions.</p> <p>Provides input to Senior Management on medium-long term business IT Strategy to help focus service and operational strategy</p> <p>Establishes and maintains communication processes and channels across business functions</p>
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Working Group 38 – Sub-Group 3: Project Management Outcomes

Recommendation to be implemented:

The following is a list of recommendations from the Working Group 38 – Subgroup 3. Our task was to identify what the outputs of an effective Project Management Office should look like and what outcomes, post transition, would be evidence that the University has a well- functioning PMO.

Recommendation 1: Define what makes an effective PMO

- **Value Delivered: Customers receive benefits of a well-planned, well-executed project**
 - Projects are all executed in a similar manner using best practices
 - Projects are
 - Completed Successfully
 - Completed Efficiently
 - Well Documented
- **Strategic Alignment: The University receives improved service and more efficient use of resources in the pursuit of its mission and strategic vision**
- **Operational Efficiency: A PMO should increase productivity and the efficient use of resources, while continually improving their processes**

Recommendation 2: Define metrics that can be used to track PMO effectiveness

All of the metrics should be tracked over time to be used in the continual improvement process of the PMO.

- **Delivered Value Outcomes**
 - Percentage of Benefit Realization – the realization of benefits against the business case for the project
 - Percentage of Customer Satisfaction – measure of the customers satisfaction with their project results as well as the process
 - Project Risk Assessment – tracks both negative events and positive events that indicate risk that is either minimized, controlled or avoided or opportunities that are achieved
- **Strategic Alignment Outcomes**
 - Percentage of Projects Aligned to Strategic Plans – the percentage of projects that can be tied directly or indirectly tied to a specific College, Division, or University strategic goal or objective
 - Return on Investment – amount of benefit received from a successful project versus the overall project cost
- **Operational Efficiency Outcomes**
 - Percentage of Completed Projects – number of completed projects versus the number that are failed, canceled, or on hold

- Percentage of Effort – percentage of effort, broken down by time, spent working on projects to replacing current systems versus working to maintain the current system
- Resource Management – the effectiveness with which a PMO manages the resources made available to it
- Time to Mobilize – the time from project kick-off to the sign-off on being complete

Recommendation #3: Define the methods and tools that will be used to collect, calculate and publish the metrics.

- Project Management Software
- End of Project Reviews
- PMO Process Reviews
- Stakeholder Feedback
- Dashboard of Projects/Metrics using Portfolio Management Software
- Resource Management Software

Recommendation #4: Establish the institutional foundation needed for a successful PMO

- Requirements to be supplied by the Division of IT and/or the University
 - Executive level support for the PMO
 - Commitment to following project management policies and procedures set forth by the State, System, Texas Department of Information Resources (DIR)
 - Collaboration Opportunities
 - Career paths for project management professionals
 - Assistance in recruitment and development for project management professionals
 - Investment in and appropriate funding for project management
- Requirements to be supplied by the PMO
 - Transparency in process and published metrics
 - Consistency in methodology and process
 - Responsiveness to customer feedback
 - Commitment to continual process improvement
 - Support of staff growth in the project management career paths
 - Investment in tools and training to stay current in the project management field

Working Group 38 – Sub-Group 4: Project Management Tools

The Charge

The charge given for this sub-group, as defined in the Working Group #38 kick off presentation, was to, *“Identify potential tools for project and portfolio management to ensure consistent project delivery across all IT units. What visibility needs to be available for ongoing projects? Produce recommendations for periodic reporting by stakeholder group. This includes both automated reporting and meeting/event reporting to stakeholder groups and committees.”*

To meet this charge, sub-group 38.4 focused efforts on the following key areas:

1. Identifying best-in-class, enterprise, project management tools,
2. Gathering data and information on tools already in use across campus,
3. Creating a tool matrix for alignment with industry standard requirements, and
4. Documenting process inputs and outputs of project management and ways the tool should integrate or facilitate information sharing from areas like demand management, governance and portfolio management that will allow for greater visibility and strategic decision making.

Recommendation to be implemented

The 38.4 sub-group recommends that an Enterprise Project Management tool be implemented to support a centralized Project Management Office (PMO) by providing project visibility, standardized reporting, accountability and streamlined operations at all levels of the organization.

Adopting an enterprise-level Project Management Information System (PMIS), will add substantial value to the proposed, centralized PMO including access to long-term historical data, more reliable estimates and forecasts for future work, quicker decision-making, and higher resource utilization. There are also several identified intangible benefits such as cross-functional collaboration, and shared knowledge and processes.

An RFP taskforce may be utilized to further investigate tool alignment with specific requirements stemming from recommendations on the organizational structure of the centralized PMO, metrics needed to be captured from each line of business or supporting unit, and executive reporting needs. Furthermore, a taskforce should carefully consider feedback from stakeholders at all levels to ensure an enterprise tool fits the needs of both the organization and the various units involved to gain buy-in and adoption.

Strategic Considerations

The current campus environment consists of multiple, independent IT units, which manage projects using a multitude of methodologies, tools, resource pools, and reporting standards to complete projects. Though the Texas A&M University System has published best practices, templates, and a guide to assist with the interpretation and application of the Texas Administrative Code (TAC) 216, these resources are supportive in nature and are not required.

This environment poses many challenges to successfully managing projects across the enterprise including differing views of progress expressed by different parts of the organization, delays in reporting that result in old data, and difficulty in implementing new or updated procedures or standards to meet state and system requirements. This has created a lack of visibility, accountability, reporting, and consistent processes. Additionally, there are many units/departments who do not have formal

processes, tools, or even defined project management roles or positions, which can cause inefficiencies, redundancies, and increased project timelines and costs.

Key Strategies Considered

The development of an enterprise tool recommendation to support the primary business need for an IT-focused PMO and supplementary PM tools to support other methodologies, levels of maturity and business functions across the broader campus community.

The Decision for the Recommended Approach

No specific requirements have been identified for the tool, as the recommendation for the organizational structure of the PMO and the metrics/KPI's are still being developed. The sub-group identified some common and desired features as a starting point to assess the viability of prominent PM tools in the market. The recommended RFP taskforce will be able to develop a formal list of requirements using considerations and recommendations from the other sub-groups and the collected information and research this group has compiled on tools.

Expected Recommendation Outcomes

Based on the recommendation, the sub-group expects the formal creation of a Request for Proposals (RFP) and the development of a task force to participate in the RFP, tool evaluation and testing, and purchasing and implementation process.

Logistical Issues to Address

Anticipated challenges associated with the proposed recommendations

- Selecting a best-in-class PM tool may not be well integrated with the other lines of business and ITSM tools used in IT. If you select a best-in-class ITSM tool that provides PM functionality, it may not support the maturity of a PMO. The taskforce should maintain priority in seeking a PM tool that supports the processes defined by the PMO and one that would integrate well with an ITSM tool.
- Enterprise tool supports (or not) the input and output processes and data to have a cradle to grave view – from idea to ROI and strategic outcomes. Processes would include idea capturing, demand management/shaping, governance, PM, portfolio management, etc.
- New business processes will need to be created that will integrate the use of the new tool.
- Lack of visibility on business processes that support project management and the dependencies on other processes will provide some challenges in consolidating under one enterprise tool.

Mechanism for implementing the recommendations

- Identifying a list of requirements for the tool as well as clear goals that the PM tool will help achieve
- Ensuring the proper use of Organizational Change Management methodology to gain buy-in and adoption
- Forming a task force and using the Texas A&M RFP process for the tool selection. The taskforce should include any current users of the ServiceNow Project and Portfolio Suite, project managers from across the various IT units, representation from Compliance, Finance and Audit, and stakeholder representation in the form of both faculty and staff.
- Once a final decision has been made on a PM tool, an implementation plan should be followed to ensure a successful rollout
- Phased rollout to ensure that unit/department needs are met

Customer/stakeholder feedback mechanism

- Stakeholder feedback should be gathered throughout the process, including soliciting information on what tools have worked and not worked across campus, during tool demos and during trials/testing.
- Customer feedback should be gathered through surveys and demos.

Budget impact

- Upfront cost of the enterprise tool and licensing which could include a one-time services cost for configuration and onboarding
 - Training and resources for support staff and end users
- Possible software integrations:
- Identity/SSO
- Other project management systems that will feed data into the enterprise project management tool
- Data warehouse or reporting services
- Operational costs which can include resource allocation for tool administration, report development, and configuration changes

Major Challenges Encountered and Resolution

Resources Needed

- Centralized funding
 - Having adequate funding for any product we select will be important. Today, different groups use a variety of products due to budget constraints. Having a product centrally funded will provide a common platform all groups can use without putting a strain on budgets.
- Training
 - Training will be important with any product chosen to ensure all users are familiar with the product and using it in a similar manner. The taskforce should consider the availability and cost of vendor provided support and implementation resources. Dedicated support personnel directly from the vendor and direct access to the knowledge source helps to solve problems and create efficiencies with the tool.
- Communication/adoption campaign
 - Change management is imperative in any new initiative. How changes are communicated can affect buy-in and the overall success of the new product. Resource considerations could include a website for progress and knowledge and communication personnel to assist in developing communication and artifacts.
- Implementation team for configuration or customization
 - We would recommend a dedicated project implementation team is recommended to drive the initial tool launch, including any configurations, customizations, integrations and user access.
- Support resource(s) for ongoing user access management and upgrades/maintenance
 - We would recommend a support team to maintain ongoing user access needs, vendor relations, knowledge, and support processes for the tool.

Resistance from stakeholders to be overcome

- Learning a new system
- Resistance to changing from current tooling and processes
- Highlight the benefits the new tool can provide to help overcome resistance to using it.
- Resistance to visibility into their work
- For many it will be a cultural change to allow visibility into their work and processes. As part of the change management and communication plans, it will be important to highlight why this is important and how it helps the organization.

Impact on stakeholders

- Process changes
 - Project/Demand intake may be impacted, visibility for stakeholders through the tool - project progress, backlogs, task assignments, etc. – transition to support, knowledge base
- Changes to functionality (+/-)
 - With any new tool chosen, there may be a loss of functionality for some users, or a different method in which tasks must be completed, or process improvements with new functionality.

Key Logistical Issues to be completed and proposed timeline

Rules/SAP needed

- No additional needs

Organizational structures impacted

- All consolidated IT units could be impacted
- Resource pools that are assigned to other units and portfolios would need to be available and visible

Academic impact

- Academic unit org structures will be more impacted as they are not currently supporting full-time Project Management roles/positions

Other

- \$250K+ purchases are subject to approval by CIO and PM processes

Performance metrics to showcase success

- Adoption rate – number of active users
- Identify success percentage of applicable IT project resources identified and recorded in a resource pool within the tool
- The ability to compile a report that includes projects from all levels of the organization and can be broken down by supporting unit/team, project level, portfolio, or project type.
- ROI
 - -benefit to the organization over time
 - A common tool provides common language and collaboration.

**Appendix A – Sub-Group 4
Enterprise Tool Matrix**

HIGH LEVEL FUNCTIONALITY	MICROSOFT					
	FRESHSERVICE	PROJECT	MONDAY	SERVICENOW	WRIKE	TEAMDYNAMIX
DASHBOARDS	Y	Y	Y	Y	Y	Y
COMMENTING/NOTES	Y	Y	Y	Y	Y	Y
DUPLICATE PROJECT	Y	Y	Y	Y	Y	Y
FILE SHARING	Y	Y	Y	Y	Y	Y
GANTT/TIMELINE VIEW	Y	Y	Y	Y	Y	Y
GUEST USERS	Y	Y	YB	YB	Y	Y
ISSUE TRACKING	Y	Y	YB	Y	Y	Y
RISK TRACKING	Y	Y	Y	Y	Y	Y
PROJECT BASELINE RECORDS	Y	Y	Y	Y	Y	Y
TEMPLATES/WORKFLOWS	Y	Y	Y	YB	Y	Y
PROJECT PRIORITIZATION	Y	Y	Y	Y	Y	Y
TAGGING/NOTIFICATIONS	Y	Y	Y	Y	Y	Y
TASK DEPENDENCIES	Y	Y	Y	Y	Y	Y
TIME TRACKING	Y	Y	Y	N	Y	Y
SSO	Y	Y	Y	Y	Y	Y
RESOURCE MANAGEMENT	Y	Y	N	N	Y	Y
INTEGRATION SUPPORT	Y	Y	Y	YB	Y	Y
MULTI-TENANCY	N	Y	Y	N	Y	Y
DEDICATED SUPPORT	N	Y	Y	N	Y	N
REPORTING	Y	Y	Y	Y	Y	Y
PORTFOLIO MANAGEMENT	Y	Y	Y	Y	Y	YB